UK COMMISSION FOR EMPLOYMENT AND SKILLS

Enhancing choice? The role of technology in the career support market

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Executive Summary

This report explores the role that technology has played in the development of the career support market. This market is conceived broadly to include all possible resources that individuals might draw upon to support them in their career development. A key element is the role that is played by public-sector career services and by careers professionals; though these resources are supplemented by services paid for in a wide range of ways and delivered by a range of professionals and non-professionals.

The purpose of the report is to consider how this broader understanding of the career support market and the role that technology is playing within it can be used to increase the choice of consumers whilst improving the cost-effectiveness of public investment. With the proposed launch of the new all-age careers service in England, and the proposals relating to career guidance in the Browne report on the future funding of higher education, the profile of career support is now high. However, the current public-sector spending restraints require policy-makers to think creatively about how to deliver services. The findings of this study suggest that careful and strategic interactions with career support services outside the public sector could make a contribution to increasing the coverage of the market, consumer choice within it, and the overall quality of what is available. They also suggest that changes in technology have the potential to increase the efficiency of service delivery within the career support market, to enhance existing services, and to develop new paradigms of career support.

For the purposes of this report, the term “career support market” is defined as the conceptual space within which individuals who desire career support transact with those who provide it. Crucially, it is noted that relatively few of the services within the career support market are paid for by the clients who access them; most are paid for in other ways. Exploring and understanding the tensions between the customers who pay for career support services and the clients/consumers who use them is a key issue in informing public policy in this area.

Consumers in the career support market

A further key issue in considering the relationship between the individual and the career support market is how consumers in this market behave. There is relatively little research that examines consumer understanding and behaviour in the career support market. What does exist suggests that consumers often find the market confusing and difficult to penetrate. The high level of institutional instability that has characterised the market has contributed to this, as has the use of jargon and the fluidity and complexity of user entitlement to public-sector support.

Consumer understanding of the career support market is increasingly dependent on their usage of the internet both to discover what is available and to directly access services online. However, a small-scale study conducted as part of this project suggested that consumers’ levels of digital literacy are often low and that their search strategies tend to be limited. Existing literature on the use of career information online and on the strategies generally utilised in searching the web suggest that there is a strong case for focusing on digital literacy and information handling as part of the development of individuals’ career management skills.

How the career support market operates

Analysis of the career support market reveals that it is complex and layered. Consumers interact with a range of services funded through different mechanisms and delivered against different paradigms. The primary career support market includes any provider of information or services which help people to navigate their careers; within this market, an important sub-set is professional career guidance, which is potentially a market in its own right, though it has tended to operate as a quasi-market or as "monopoly" provision within particular settings. These services are underpinned by a range of secondary market actors who provide them with information, systems and training.

Given this complexity, making changes or improvements to the career support market is not easy. However, much of this market remains either funded by the public sector or closely related to it. If career support is seen as delivering a public good by, in particular, promoting social mobility and supporting the effective functioning of the learning and labour markets, it may be inadvisable for government to allow the market in career support to fail. Policy-makers accordingly have the opportunity to use funding and management tools both to develop the public-sector components of the market and to influence the wider market. Other potential policy tools include the use of regulation or quality-assurance mechanisms.

The study looked in detail at six international comparators to explore the career support market and how it had been shaped by different policy frameworks. While the comparator countries demonstrated considerable diversity, a number of key issues emerged. It was clear that career support requires public investment, although the shape of this public investment can take a variety of forms. Where public funding has been withdrawn, there has been a significant reduction in the availability of career support. A key element of public-sector investment in all of the countries examined is the provision of good-quality career and labour market information (CLMI) as a platform on which the rest of the market can operate. This clear commitment to the public-sector provision of CLMI has led some countries to develop centralised portals that gather together a range of CLMI and make it available for the career support market. In the UK, such information is largely publicly owned but currently exists in more diffuse forms across the Sector Skills Councils, Labour Force Survey and other public-sector resources (see GHK, 2010).

It is also noteworthy that career support funded through the "individuals pay" approach has remained a limited niche market in all the international comparators. Other issues addressed in this international part of the study included approaches to the use of technology, market regulation and private-public partnerships. While our review revealed much interesting practice to draw upon, no one country or approach emerged as offering a clear model that would be appropriate for the UK.

The impact of technology on the career support market

The evidence reviewed in this report suggests that ICT is being applied in ways that are changing how career support is being experienced by individuals. This is not a complete transformation, but rather a rapid evolution in the ways in which career support services are managed, delivered and taken up. A number of trends are shaping these changes. Firstly, new players are entering the career support market

because of the low entry cost, rapid development and high market penetration which can be achieved through ICT. Secondly, ICT is being applied in both new and existing organisations to increase efficiency in terms of "cost per user", generally by increasing the numbers of users. In some cases, more users are being supported in largely self-managed contexts to find the information they need via web-based resources; in others, the internet is being used to communicate with more users than could otherwise be the case. Efficiency is also being delivered through the use of client management systems which manage operational processes to ensure that as many people as possible can be served.

Alongside this, services are being developed and enhanced through additions to traditional modes of career support. Opportunity directories, for example, have now gone on-line, which means that additional resources can accompany them and content be refreshed more regularly. Services can also be enhanced by the provision of automated interaction tools and information resources that enable users to undertake self-directed career learning in ways that make their one-to-one time with advisers more effective.

New technologies are therefore being used to support and extend existing ways of delivering career support. However, they are also being used to develop new service paradigms, especially related to the communicative potential of social media applications. Horsesmouth and WikiJob provide examples of career support services whose value to users is based not on the expertise of careers advisers but rather on career informants and "collectivised knowledge" respectively. Alternatively, the Training Innovations e-guidance approach reworks the guidance interaction through the creation of a virtual learning environment that enables users to move between generic resources, professional guidance and peer-learning communities.

Business models in the career support market

The report contends that the ways in which the costs of services are covered have an impact both on which technologies are used and on which services are offered to the clients. It identifies five main ways in which services are paid for: by government, by a charitable body, by individuals, by opportunity providers, or by being embedded in other services. A distinction is drawn in relation to these different funding models between the "customer" who pays for a service and the "client" or "consumer" who receives the service.

The "government pays" model remains the mechanism through which the majority of career support services are funded. Actors in this segment of the market have largely utilised technology to increase efficiency, although there are also some examples of the development of enhanced services and new service paradigms. An issue that emerged within this section of the market was the way in which current public-sector management, target and inspection regimes tend to make innovation less likely. Policy-makers may wish to consider whether a management framework can be developed that offers more space for innovation and knowledge transfer from other elements of the market.

Where career support is funded by the "charitable body pays" model, the services that are offered tend to be more discrete or developmental. This funding model seems effective in identifying innovation and in developing new products and services, but to experience problems in achieving sustainability.

The “individuals pay” model is the most straightforward funding model, as it is the only one in which the customer and the client are the same person. This removes the scope for conflicts of interests and reduces the ethical complexity for the practitioner. However, research with customers and stakeholders in the “individuals pay” market and with international comparators suggests that this funding model is at present confined largely to a high-income niche. Actors in the “individuals pay” market use technology to market their services and to facilitate some one-to-one delivery, but there does not seem to be a current market for less intensive (and therefore cheaper) “individuals pay” career support. Some of the stakeholders interviewed for the project had experimented with selling smartphone apps and e-books, but none had managed to develop a sustainable business in these areas.

In contrast, the ”opportunity providers pay” (employers or learning providers) segment is a much larger and more mainstream aspect of the career support market. The recruitment industry has always overlapped with career support, and new technologies have increased the extent of overlap. Many “opportunity providers pay” sites offer substantial CLMI and advice that goes beyond helping people to navigate recruitment services. Much of this provision is innovative and high-quality, although these sites generally avoid intensive approaches involving professional career guidance staff.

The final model for the funding of career support is where it is offered as an embedded part of a broader experience, e.g. education or employment. This approach is particularly strong in higher education where services are staffed by skilled professionals who are able to exercise a fair degree of autonomy in the development of their services. Correspondingly, many higher education careers services have been able to innovate in their use of new technologies and are beginning to mainstream some of this innovation into their practice.

Alternative examples of “embedded career support” are provided by trade unions, professional bodies and employers. The outplacement service offered by Penna provides a further example of a service that has utilised technology effectively both to increase efficiency and to respond to client demand. Embedded models seem to offer a fruitful context for career development allied to flexible delivery methods, although there may in some cases be constraints to their impartiality.

Implications for policy-makers

This study has been undertaken in a context of public spending restraint and considerable change for the career support sector. Government is appropriately asking questions about whether technology could provide the sector with increased efficiency or enhanced service provision. The answer suggested by this study is a qualified “yes”. Not only has technology improved the offer of the public sector: it has also stimulated the segments of the career support market that are funded in other ways. However, our research has also suggested that the career support market needs to continue to be underpinned by a fairly substantial level of public-sector investment.

This leaves policy-makers with two related questions. Firstly, what is government’s general role in relation to the broader career support market? Secondly, how can government commission public-sector services more creatively and strategically to take advantages of the opportunities offered by new technology and the broader growth of the career support market?

The first role that government can take is to stimulate the career support market and build its capacity. This report makes the following suggestions in this area:

- There would be benefit in conducting further research into the operation of the "individuals pay" career support market, to examine how to stimulate this market and how hybrid "government pays/individual pays" models might operate.
- Linked to this, it would also be valuable to explore further how technologically driven "individuals pay" services such as smartphone apps could contribute to the career support market.
- Government may wish to consider what policy levers exist to engage employers and learning providers in extending and improving the delivery of embedded career support.

A key aspect of the stimulation of the career support market is supporting consumers to become more informed and ultimately to drive the market through demand. However, the discussion of consumer knowledge in this report suggests that there is a need to actively develop consumer awareness. This report makes the following suggestions in this area:

- Government and the careers sector may wish to consider how education and marketing related to the career support market might stimulate consumer understanding and willingness to pay for career support.
- There may be value in viewing digital literacy as a career management skill and in providing enhanced opportunities for its development.

The second role that government can play in relation to the career support market is in relation to the regulation and quality assurance of the market. This report makes the following suggestions in this area:

- The sector may wish to explore ways of increasing the expertise and skills of careers practitioners to enable them to creatively utilise new technologies in their practice.
- Relevant sector bodies may wish to explore the idea of developing a protected or chartered status for careers professionals (while recognising that not all value in the career support market is derived from professional status or expertise).
- The sector may also wish to examine the feasibility of a kitemark for web resources and to examine how online community-based approaches could be used to develop mechanisms to collectivise knowledge and judgements about where value resides within the career support market.
- There is likely to be value in ensuring that the market is underpinned by high-quality core CLMI. One way to present this would be through a single portal where such information can be presented in an integrated user-oriented form.
- Government and the sector may wish to consider further how the approach taken to commissioning ensures the appropriate balance exists between tight targets to drive efficiency and organisational/professional autonomy to facilitate innovation.

Finally, government can seek to compensate for the failures of the career support market. This report makes the following suggestions in this area:

- There may be value in reframing the commissioning and delivery of “government pays” career support services to take more account of what is already available through other forms of funding of career support.
- There is value in ensuring that career support services are available to those who would not be able to access them through other funding mechanisms.
- Government and the careers sector may wish to explore how the market’s current limited success in supporting and mainstreaming innovation could be improved.

Introduction

Career support plays an important role in allowing individuals to make transitions and function effectively in the economy. In the past, this has been conceived mainly as supporting young people in making career decisions; but increasingly career building is seen as an ongoing process in which people construct their career throughout their life-course. This means that individuals are likely to want to draw on different elements of career support at various stages through their lives and to access it flexibly according to their own needs.

A dynamic labour market has the potential to stimulate demand for career support. However, given current pressure on public-sector finances, it is unlikely that this demand can be fully met through the delivery of conventional public-sector careers services. A complex market of providers of career services has already emerged within the UK; this is underpinned by a wider range of providers of information and other technology-mediated services. In a previous paper for the UK Commission (Hooley, Hutchinson & Watts, 2010), we noted that new technologies have supported a substantial development in the career support market and have played a crucial role in shifting the nature of the services that are offered and how these are delivered to the end-user. However, key questions need to be asked about the extent to which the growth of technology-dependent services has served to increase consumer choice and to expand access to quality services. A related question is whether this has left people on the wrong side of the digital divide with reduced access to services.

This report will explore the nature of the career support market further by mapping it in more detail and exploring its nature, its key players, and its limitations, linked to the potential for action to further stimulate this market. How the market operates will be examined through the lens of how career support can be provided to individuals throughout their lives. It will be argued that developing an understanding of how the career support market is funded, and of the business models that transform this funding into services, is crucial in developing effective public policies in this area.

A market in careers

Previous research that has explored the role of markets within careers has tended to focus on the possibility of commercialising particular aspects of career support (OECD, 2004a; Watts, Hughes & Wood, 2005). This is an important policy concern and will be returned to in Section 1.2. Here, however, the concept of a market in careers is being broadened to provide a framework for exploring the way in which individuals transact with opportunity providers in developing their careers.

Careers comprise the pathways of individuals through learning and work. The idea of career as market provides a possible way of conceptualising the field by seeing it as a market within which a number of actors are operating. Each actor pursues their own needs, interests and concerns; through a series of transactions, the market as a whole reaches accommodation between these interests. The quality of this accommodation is of significant public interest, in view of its economic and social impact. The purpose of this section is to establish some key terms that may be useful in examining this market and how it operates.

If an individual is seeking employment, we describe them as interacting with the **labour market**. They may ask the question "what work can I do?" Correspondingly, employers ask "who can I get?" in their search for the appropriate human capital to fill the post, and engage in promotional activities to publicise the vacancy and attract applicants from whom they can select.

Closely allied to the labour market is the **learning market**. In this market, individuals ask "what qualifications do I need?" and "where should I study in order to acquire them?". Learning providers vie through promotional activities to attract these individuals to enter courses either in exchange for money or to access public money of various kinds.

Taken together, the labour market and the learning market might be said to comprise the **careers market**. In this sense the careers market is composed of all the opportunities that an individual might pursue within their career and all of the employers and learning providers who offer these opportunities.

The careers market does not provide a level playing field for all market actors. For those with money, qualifications and personal or family contacts, more opportunities are likely to be open and therefore more choices are likely to be available to be made. A complex mix of social, environmental, psychological and intellectual factors combine with a healthy dose of luck to provide individuals with the opportunities and decisions that contribute to the development of their careers. It is possible to describe this combination of talents and social and educational positioning as an individual's **career capital**. Career capital enables an individual to operate within the careers market, but is not necessarily or exclusively what determines outcomes. Individuals can also benefit from support and guidance to identify how best to invest whatever career capital they have.

Even for an individual with relatively little career capital to spend, the careers market is likely to be bewildering. Without some help and tools to manage their interactions with the market, they are vulnerable to being misled and may subsequently make poorly-informed choices. However, individuals are not left alone to sift through the promotional information supplied by opportunity providers as they make their decisions with the careers market. Rather, they are able to access a wide range of additional sources of information, together with other forms of support, advice and guidance. This **career support market** is also complex, and requires those who are looking for help to choose between services and other sources which differ in terms of the amounts and types of interaction they offer, their impartiality, independence and expertise, and whether or not they involve costs. An increasing amount of these sources of career support are available through technologically mediated routes: indeed, some are only available online.

If it is economically important for individuals' skills and potential – their career capital – to be wisely invested, then the functioning of the careers market is of critical public concern. Where the careers market functions well, individuals will engage positively in the economy, finding opportunities that fulfil them and developing skills that enable them to take advantage of market opportunities. Conversely, where the careers market functions badly, individual aspiration may be stymied, and human capital will not be applied effectively and creatively to the changing needs of the economy. Accordingly, government and its agencies have a strong interest in ensuring that the career support market operates optimally in support of the careers market.

A market in career support

The decisions that individuals make about their own careers are likely to have a substantial impact both on their own happiness and on the general economic and social well-being of society. Career support plays a crucial role in identifying human potential and in helping individuals to make choices that enable their potential to be developed and utilised. Like much education, it is therefore both a public and a private good. Correspondingly, career support services have traditionally been paid for in a mix of ways that reflect in complex forms the potential benefits that they bring to society, to employers, and to the individual.

Career support is concerned with how individuals relate to learning and work across their life course. It is not simply about the provision of a matching service that serves the immediate needs of employers: its goals are broader, and its impact is expected to be realised over the life-span of the individual. Career support describes a range of services and relationships that people draw upon in order to help them to make decisions, navigate changes, deal with adversity and maximise their personal and economic potential. In considering how it can be provided more cost-effectively through the use of market mechanisms, including those involving technology, it is important that these broader aims and impacts of career support are recognised.

Career support exists in both professional and non-professional forms. Users often seek career support from a range of people within their social networks, such as teachers, librarians, managers, HR professionals, friends, family and colleagues (MORI, 2001; Taylor et al., 2005; Ravenhall et al., 2008). These include what might be termed “career informants”: people with knowledge and experience about the specific career paths that users are interested in entering. Alongside this support sits the profession of career guidance, which mobilises specialist information (e.g. LMI, knowledge of recruitment) and professional helping skills (e.g. the guidance interview, careers education) in ways that frequently draw on and utilise other non-professional sources of career support. The growth of the social web and other forms of enhanced information and communication technologies has the potential to reframe some of these relationships and to create new ways in which individuals can access career support.

This report thus uses the term “career support“ to offer a broader and more inclusive category than the term “career guidance”. The OECD definition of career guidance is useful in describing the broad range of professional interventions:

> “Career guidance refers to services and activities intended to assist individuals, of any age and at any point throughout their lives, to make educational, training and occupational choices and to manage their careers. Such services may be found in schools, universities and colleges, in training institutions, in public employment services, in the workplace, in the voluntary or community sector and in the private sector. The activities may take place on an individual or group basis, and may be face-to-face or at a distance (including help lines and web-based services). They include career information provision (in print, ICT-based and other forms), assessment and self-assessment tools, counselling interviews, career education programmes (to help individuals develop their self awareness, opportunity awareness, and career management skills), taster programmes (to sample options before choosing them), work search programmes, and transition services” (OECD, 2004b, p.10).

Professional career guidance is thus a sub-set of career support: the interface between the two is the interface between a professional activity and a range of broader services, resources and relationships. These categories are not fixed and immutable, since the definition of what defines a careers professional is itself contestable. The recent report of the Careers Profession Task Force (2010) concludes that: "This community of practice [careers professionals] is only weakly professionalised. It does not have the essential characteristics of a strong and autonomous profession: the capability to speak with one voice, and a common set of professional standards and a code of ethics" (p.3). The report goes on to argue that there are strong reasons for further professionalisation of the field of career guidance. This position is clearly supported in the recent report by Browne (2010) on higher education funding which, in seeking to develop a stronger market in the provision of higher education, attaches considerable importance to "individualised careers advice" delivered by "certified careers professionals" (p.29). However, the existence of a strong career guidance profession does not diminish the value of a wider career support environment where consumers have the opportunity to draw on the inputs, experience and expertise of a wide range of different players.

As noted in Section 1.1, there is a public interest in ensuring that the career support market operates optimally in support of the careers market. This applies both to the career support market in general and to professional career guidance in particular. OECD (2004a) and Watts, Hughes & Wood (2005) have argued that the roles of public policy in this respect may include:

- Stimulating the career support market in order to build its capacity.
- Regulating the market and assuring the quality of services within this market.
- Compensating for market failures.

Our earlier report *Careering Through the Web* (Hooley, Hutchinson & Watts, 2010) added to this model by arguing that in the context of the market's interface with technology there was a need to educate the consumer, upskill the professional, and explore mechanisms for recommendation and signposting that could include but also go beyond kitemarking. The role for the public sector and the tools that are available to it will be discussed in greater detail in the present report.

How the consumer approaches the career support market

Our report begins by examining the career support market from the perspective of the individual consumer of career services. It is important to note that relatively little is known about consumer knowledge and expectations within this market. This is both because it is an area that has been under-researched and because the rapid changes that have been taking place within the market mean that consumer understanding is likely to be shifting. This section will discuss the relevant literature and will summarise the findings of a small-scale piece of consumer research undertaken as part of the present project.

The informed consumer

It is perhaps useful to explore briefly a counter-factual scenario in which the average consumer is granted total market knowledge. Such informed consumers would be aware of the wide range of options that exist for them in considering how to draw in help, advice and support in pursuing their career. Firstly, they would need to have an understanding of what is meant by the term “career” and to understand that professionals use this term to link life, learning and work rather than confining it to describe either a professional occupation or the upwards movement through a hierarchy of jobs. Armed with this lexical knowledge, the informed consumer would be in a position to interrogate a range of services in search of the one that meets their needs.

After some research (perhaps using the internet), our informed consumer would discover that the career support market offers them considerable choice. For example, an adult in search of career support can visit Next Step, call the Next Step telephone service, visit a private career coach, read any number of careers blogs and websites, or download career support tools to a smartphone. They could also access mentor support through websites like Horsesmouth, connect with professionals in their sector through LinkedIn, and access listings of courses and vacancies both online and in a wide range of community, learning and business venues. The informed consumer would consider carefully what kind of qualification and quality standards were possessed by the services that they consulted and would carefully choose where they feel they need professional input and where they wish to draw in the perspectives of others such as career informants or prospective employers.

Our putative consumer would be aware that everything that is available in this market is paid for in some way, but might notice approvingly that not much of it comes with a price tag for the individual. However, they might also exercise some caution in taking at face value the information or advice that is provided by a party with a clear interest that differs from their own. They would recognise that who pays for a service, and why, are likely to have an influence over what that service offers. They would balance their willingness to pay with the nature of the service provided and the potential partiality of what was offered. Given this careful and critical engagement with what is available, the informed consumer would be likely to conclude that they were well served and able to exercise considerable choice.

Unfortunately, the informed consumer painted above exists mainly in the idealisations of economic theory. It is therefore important to gather what is known about actual consumer behaviour in relation to the career support market.

What is known about consumer behaviour in the career support market

Research about consumer behaviour in relation to the career support market is limited. However, this section will draw out some key messages from the existing literature and will explore their implications for the career support market. A number of studies which examine consumer perspectives will be considered, with particular reference to two studies commissioned a few years ago by the Guidance Council (MORI, 2001; Taylor et al., 2005). There is a strong case for updating these studies to take account of the changes that have taken place since they were conducted, particularly in the use of technology.

An important issue is how far consumers understand that the career support market exists at all, and the range of products and services that are on offer through it. Taylor et al. (2005) found that while most people were aware of the availability of career information, advice and guidance (IAG) services, a minority (one in four) could not spontaneously think of any organisation that provided IAG about training, learning or work opportunities (p.26).

It is important to emphasise the complexity of the career support market and the range of barriers (including targeted provision and entitlements), which mean that many individuals are likely to find the landscape confusing. As Jackson & Hutchinson (2008) argue, this complexity "could be viewed as a rich tapestry of provision" but could also "be seen as a potentially confusing map with unclear pathways and poor signposting" (p.14). Hawthorn & Ford (2006) concluded that terms such as "guidance" and "IAG" have the potential to create confusion for users and potential users of services.

Taylor el al. (2005) found that the career support provider with the highest level of recognition amongst consumers was Jobcentre/Jobcentre Plus. This was perhaps unsurprising: within England, the iterative rebranding of careers services for adults, and the lack of a stable role for Connexions (formerly the Careers Service), were unlikely to have improved public recognition of some of the other major players in the career support market. Peck (2004) argued that this "uncertain administrative framework" of restructuring and rebranding is one of the main issues that has influenced the development of careers services in the United Kingdom. Subsequently, a major public investment in marketing the Learndirect Advice distance guidance service for adults led to brand recognition levels in the general public of over 80%, though this contrasted with 6% in the case of the relatively unpublicised nextstep brand for face-to-face adult services (Watts & Dent, 2008), and has been undermined somewhat by subsequent brand changes. The fact that all of these public services in England are now to be brought under the banner of a single brand as part of an all-age careers service (as is already the case in the rest of the UK) potentially simplifies the situation somewhat, but only if this brand has an opportunity to stabilise and build recognition with the public.

Nonetheless, it is important to acknowledge that the majority of people interviewed in the surveys by Taylor et al. (2005) and MORI (2001) were aware of the existence of

career support services and satisfied with the services that they had used. The surveys also found high levels of support for the idea that adults should continue to learn new skills as they get older and that career support could be useful in helping people to make the right decisions about education, training and work (Taylor et al., 2005, p.22). Broadly, it is possible to summarise this research as indicating that there is a clear demand for career support, but that consumers do not always find the process of accessing these services straightforward.

The Guidance Council reports also provide useful information about how and why individuals access career support. Taylor et al. (2005) show that the vast majority of people (78%) say that they take the decision to access career support services independently rather than waiting for the services to be suggested by someone else (p.39). They are most likely to seek support because they want to develop new skills (44%) or update current skills (36%). Consumers are more likely to seek advice on education and training than because they want to change jobs (19%) or because they are seeking promotion (10%) (p.38).

Taylor et al. also showed that people take a variety of routes when seeking career support. People were most likely to seek help from their employer (26%), the internet (25%) or by accessing their social network (word of mouth) (22%). As will be discussed, it is likely that the internet has since become an even more popular route to access career support. However, it is important to note that just because people are accessing career support from the internet does not necessarily mean that they are accessing this support from conventional public-sector career service websites. So while in a small recent study young people generally felt that the Connexions Direct website was a “good idea”, very few of the sample (n=135) had actually accessed the service (Hutchinson & Parker, 2009, p.39).

By contrast, the levels of usage of the web-based and telephone-based services provided by the Learndirect Advice service (subsequently rebranded as the Careers Advice Service and now integrated into the new Next Step service for adults, which in turn is to be integrated into the forthcoming all-age service) have been very substantial, extending to several millions per year. Comparisons with the relatively low levels of investment in marketing for a comparable service in New Zealand, leading to significantly lower levels of brand recognition and – in turn – of service usage, demonstrate the impact of marketing in generating these volumes (Watts & Dent, 2008).

In the study by Taylor et al. (2005), people were less likely to access career support directly by visiting the Job Centre (17%), going to a recruitment fair (4%) or walking past a careers service office (4%) (p.29). A recent small-scale study by Hibbert (2010) suggested that young people are likely to seek career support from school staff and teachers, youth workers, parents, family or friends, and that knowledge of Connexions was limited. The message here is clear: that proximity, market mediators and referral, as well as marketing, are key to brokering an individual’s engagement with the career support market.

Search strategies and consumer behaviour online

When Taylor et al. (2005) conducted their research, they found that two-thirds of adults would be interested in accessing career support online. The most enthusiastic groups tend to be younger and more qualified or working in non-manual occupations. They also found that those who were not interested in online career support lacked

confidence in the use of technology and had experienced problems in accessing career support (pp.100-104).

It is important to attend to the digital divide when considering how far technology has the capacity to reframe the consumer experience of career support. However, it is also important to recognise that usage of the internet has increased considerably, and continues to grow. Recent Office for National Statistics (2010) data note that currently 30.1 million adults use the Internet every day or nearly every day, which is almost double the estimate in 2006 (though there were still 9.2 million adults who had never used it). There are therefore strong reasons to believe that the internet and other technology-dependent routes, are likely to become even more popular ways through which individuals access career support.

If technology provides individuals with access to career support as well as providing a mechanism for the delivery of a vast range of information and services, it is important to examine not only whether people are using the internet, but also how they are using it. To illuminate this issue, research was undertaken with 38 individuals, of different ages and qualification levels, and with different levels of participation in the labour market. Participants were recruited because of their use of one of the following four services: higher education; further education; Next Step; and Jobcentre Plus. The aim was to create a diverse sample that included individuals who might be more likely to be on the “wrong” side of the digital divide. Further information about the participants is provided in Appendix 2, along with some additional findings not reported in this section.

Participants were asked a series of questions which explored what their job or career ambitions were, who they talk to about the choices they were making, where they found information, whether they had used career services and whether they would pay for them, and the extent and nature of their use of the internet for job search as well as for social purposes. Three of the four groups (excluding participants approached at JobCentre Plus, where it was not possible to secure internet access) were then asked to undertake a short computer-based exercise: they were asked to articulate and write down a career-related question or issue that was relevant to them, and then to use the internet to find out more about it. Their search behaviour was observed and a screen print was made of their search.

With only three exceptions, all participants said that they used the internet to find out about “career-related stuff”, and all but two had access to the internet. There was a good degree of awareness of how to use computers and how to explore the internet across the group, although this was not universal: three individuals were either, slow and unsure, or refused to use the computer.

Most participants reported using the internet for social networking, but were generally not using their social networking tools for career support information or to leverage their social networks in order to aid advancement. There was only one exception to this: a female who, almost jokingly, said that she was “looking for a job” as her current status on her Facebook page. Overall, the interviews suggested that participants were actively using the internet for career support, but that their strategies for using it were limited.

The computer exercise was undertaken by 27 of the 38 participants (the Jobcentre Plus office was not equipped with client internet access or wi-fi, and one of the Next Step participants refused to take part in this element of the research). The questions they formulated to explore were quite broad in nature, including:

"What sort of companies offer the job I am after"
"Looking for paid charity work"
"How much does it cost to set up a salon"
"What is the minimum wage"
"Apprenticeships in Derby"
"What decorating jobs or construction jobs are there in Derby"
"What sort of job can I do with my joint honours degree when I graduate".

The questions tended to focus on job search rather than career exploration.

All participants used Google as the starting point of their search, with none going straight to a particular career support website or service. Participants approached the search task by typing in a full question, rather than using key-word searches; none used any advanced search techniques. Other forms of internet exploration (such as using social media) were not used, despite the participants' reported familiarity with Facebook. Once an "answer" to the posed question was found, participants tended not to explore further. This "answer" was found after a relatively short search: for Next Step clients, this meant examining between 1 and 5 sites; for further education students, the search extended no further than examining 6 sites (more frequently, only 2 or 3); while the higher education students explored up to 11 sites (generally, around 6-10). Sites that were identified by participants through their searches included:

- Specific employers (such as local authorities).
- Recruitment sites (e.g. jobisjob.com / jobmonkey.com / monster.co.uk / totaljobs.co.uk).
- Career support services (Jobs4U and Next Step).
- A sector skills council.
- Universities and training providers' websites.
- Specialist sites relating to particular issues (e.g. work visas).

Participants did not spend long on a site, generally visiting 2 or 3 pages. There was little curiosity about the provenance of the information that they were getting, who provided the site, whether they could trust the information, or whether alternative responses might be achieved from different sources.

These observations are substantiated by more general research into people's search behaviours. Most such research focuses on young people and their use of electronic resources as part of their education, or on information-retrieval activities of higher education students and researchers. For example, a study of young people's information-searching behaviour (Williams & Rowlands, 2007), which reviewed a wide range of literature, queried underlying assumptions held by researchers and commentators about the "Google generation". This research found that despite the apparent expertise with which young people adopt electronic resources, their abilities to search datasets and interrogate information systems were at best questionable. Other research was cited which found how children had difficulties in formulating appropriate search terms due to their use of natural language questions (Bilal, 2000), compounded by difficulties in re-formulating their searches when the original terms proved fruitless (Chen, 2003). Williams & Rowlands (2007) concluded that "the general lack of increase in expertise information retrieval may be due – ironically – to the perceived ease with which digital systems can be searched". They further explored what research had been undertaken to identify how young people evaluated the information they got from internet searches, with one observer noting that children tended to stop their searches when they appeared to find something that

matched what they were looking for, rather than perusing the source (Williams, 1999) and checking the veracity of information found (Shenton & Dixon, 2003).

Much research that has been conducted on search behaviours has explored the behaviours of the information-literate, such as university students (Mischo, Schlembach & Norman, 2009; Wong et al, 2009), researchers (Nicholas et al., 2010) and patent-users (Azzopardi, Joho & Vanderbauwhede, 2010). It is unlikely that studies which explore the search behaviours of professional information users in specialised contexts have much to offer in the consideration of how general consumers use search to access the career support market. They may though offer more lessons for future research that examines the information use, digital literacy and search behaviour of career professionals.

However, there are also some studies which have looked at more general adult search behaviour, often in the context of the consumption of services or products. As with young people, these studies can be difficult to draw conclusions from because of the rapidity of change in the nature of search and the cultural position of the internet. But in general these studies conclude that adults, like young people, have limited search strategies and that they do not select from the range of different resources generated by their searches on the basis of a rational comparison (Johnson et al., 2004). Stenmark (2008) analysed search-engine log files to produce a typology of search behaviours, in which the largest group were ”fact seekers” who exhibited broadly similar behaviours to the participants in our study and who, Stenmark concluded, would benefit from greater precision.

While there is little direct research on the interface between job seeking, career exploration and search behaviour, Bimrose, Barnes & Atwell (2010) have explored how young people utilise the internet for career exploration. Their study shows users who are enmeshed in social media and who use ICT mainly to gather information and communicate. As in our study, they found Google to be very popular, and relatively few users expressing concerns about the provenance for the information that they were accessing, though the young users in their study appeared to exhibit somewhat more criticality and digital literacy than the adult users in our study, being more comparable to our higher education students in this respect.

Further evidence is provided by studies of parallel areas such as that by Nicholas et al. (2004) who examined the use of consumer health digital information platforms. They found that users exhibited what they described as “bouncing” behaviours in which they seldom penetrated a site to any depth, tended to visit a number of sites for any given information need, and seldom returned to sites they had visited. Again, these behaviours broadly fit with the observations that were made during our study.

Concerns about the general level of search competence should not blind us to the fact that there is considerable variation in digital literacy, which intersects with issues of experience of search, education, individual and cognitive differences, and age (Johnson et al., 2004; Aula, 2005; Kao, Lei & Sun, 2008; Ford et al., 2009). More experienced users are both more able to find the information that they are looking for, and more willing to experiment with new search strategies and engage in post-search browsing (Aula, 2005; White & Morris, 2007). Hölscher (2000) makes the point that an individual’s ability to use search strategies is differentiated not only by their experience of the web but also by their more general understanding of the area in which they are searching. Digital literacy is therefore a skill set that is embedded in other forms of knowledge. There is accordingly value in considering how it can be developed as part of the wider development of career management skills.

Thus while our observations of career-related use of the internet by adults are clearly limited in terms of their robustness and representativeness, they indicate that there is a need to understand more about how people use the internet. In particular, there is a lack of understanding of the prevailing level of digital literacy within the context of career exploration and job searching. From the perspective of the career support providers (including those funded by the public sector), an understanding of how people search for and use sites might also better inform their design, development and marketing of services.

How the career support market operates

A key finding of our earlier report *Careering Through the Web* (Hooley, Hutchinson & Watts, 2010) was that public-sector careers services vie for attention with a wide range of other actors in the online career support market. The consumer research conducted as part of the present study has reinforced this conclusion by showing that when consumers use the internet as a route to this market, they tend to draw indiscriminately from a range of sources without reference to their provenance or how they are funded.

The concept of the career support market is used in this report to denote the broad system that exists to facilitate transactions between those who wish to access career services and those who provide them. Section 5 will explore in more detail the financial models that underpin the operation of this market, but it is worth noting here that relatively few transactions within the career support market involve the direct exchange of money for services; most involve more complex non-financial transactions.

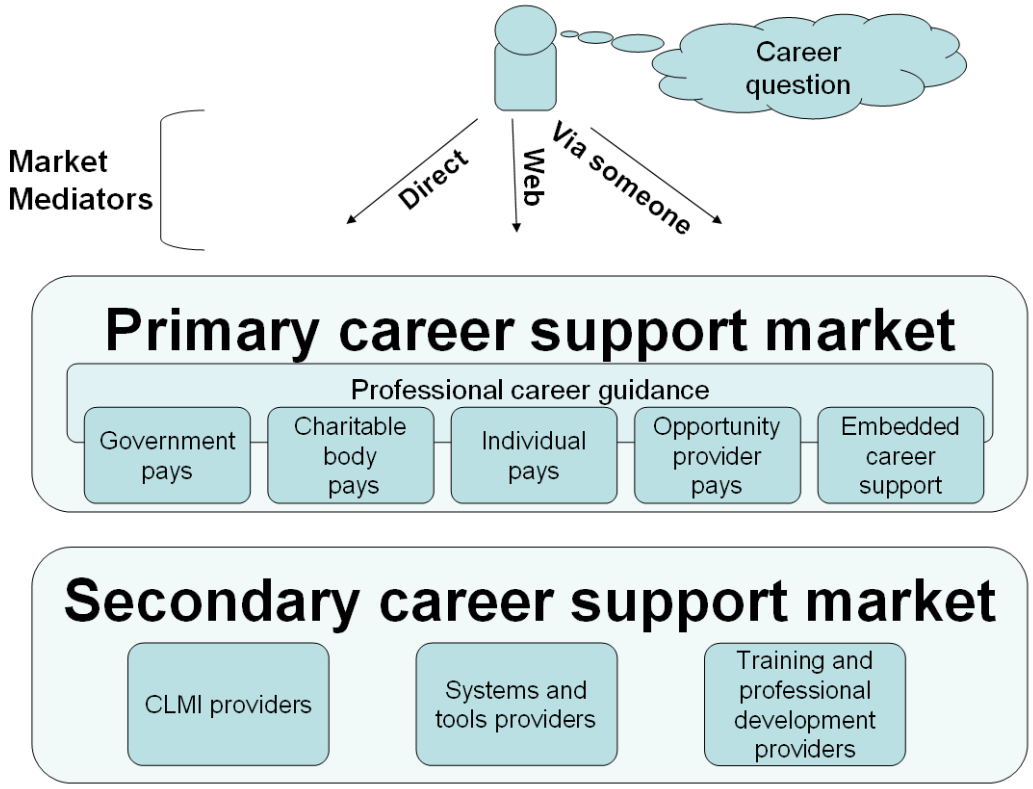
Some key concepts for analysing the career support market

As has already been argued, the career support market is complex and textured. A range of different users (young people, adults, low skill, graduates, men, women, working and unemployed) access the market, for a range of different reasons. The current structure of the market provides considerable choice to those who are aware of this range of services; however, these choices are shaped considerably by the individual's entitlement and/or ability to pay, as well as their ability to navigate the market. Nonetheless, out of this complexity it is possible to observe some structure in the market and some demarcation in the roles of different players.

The **primary career support market** comprises those market actors with whom individuals transact directly. These might include any provider of information or services which help people to navigate their careers. A crucial sub-set of this career support market is **professional career guidance**. This is potentially a market in its own right, though it has tended to operate as a quasi-market (see Section 3.2 below) or as "monopoly" provision within particular settings. The provision of professional career guidance and the wider primary career support market can be paid for through a variety of different funding models, which will be discussed in depth in Section 5. So when the individual makes the decision to seek career support, they enter the primary career support market (of which the professional career guidance market is a part) whether they are aware of making a market decision or not.

This primary career support market is underpinned by the **secondary career support market.** This comprises organisations which provide a range of products and services that actors within the primary career support market require. Most crucially, this market includes providers of data and systems, and of training and professional development aimed at the actors in the primary support market.

Figure 1: A conceptual map of the career support market



Career and labour market information (CLMI) providers draw information from the wider careers market and transform it into formats that are useful to primary career support market actors and potentially to individuals. These data include labour market information (LMI), encompassing information about labour market trends, occupational requirements and salary/wage rates. A helpful definition of LMI in the context of career support has recently been produced by Bimrose & Barnes (2010) (see glossary in Appendix 4). However, it can be extended to include a wider range of career information encompassing learning opportunities, their relationship with the labour market, and any other form of information which may be relevant to individuals moving through the careers market. In the UK, CLMI is provided by a range of different organisations drawn from both public and private sectors. The report by GHK (2010) explores this area in greater depth. However, it is worth noting in particular here the key role that Sector Skills Councils play in compiling CLMI and in mediating it in formats that are valuable for the career support market.

Systems and tools providers develop resources that underpin and enable the activities of primary careers market actors. These might include customer management systems, psychometrics and interest inventories, and e-portfolio and virtual learning environment provision. The systems category might also include developers of apps, mash-ups and other forms of technology that enable the development of new forms of career support services.

The **training and professional development** aspects of the secondary career support market underpin the skills and professional practice of the actors in the primary career support market. These include Qualification in Career Guidance

providers and professional associations, amongst other providers of training and skills development for both careers professionals and others.

Markets and quasi-markets

The concept of the career support market that has been developed in this paper is notably different from previous considerations of the role of the market in career support. In general, previous discussions were focused on the privatisation and marketisation of professional “government pays” careers services, with some additional discussion of the nature of ”individual pays” elements of the market (e.g. Watts, 1995; Grubb, 2004; Watts, Hughes & Wood, 2005). In contrast, this study conceives the market more broadly by drawing in a range of associated activities and providers, linked to the rapid and recent growth of an online market in career support (Hooley, Hutchinson & Watts, 2010).

Much discussion around marketisation takes place in response to a critique of centralised state-run industries and services in contrast to market models of allocation of services and resources. Watts (1995) discusses these arguments in relation to the provision of career guidance, citing the work of Niskanen (1971), Rothbad (1977) and Goodin (1982). However, the operation of a genuine market brings risk and ultimately the possibility of market failure. If career guidance is seen as delivering a public good by, in particular, supporting the effective functioning of the learning and labour markets, it may be inadvisable to allow the market in career guidance to fail. Grubb (2004) traces a range of ways in which career support markets can fail (including unevenness of provision, poor-co-ordination across the life course and a lack of impartiality). He argues that government needs to actively manage the career support market in order to mitigate against such failures.

Savas (1987) has developed the categories of ”collective goods” (which are used by people jointly and are therefore difficult to charge for) and ”worthy goods” (which are deemed so important that they should be available regardless of the ability to pay), to help to conceptualise the limits of free-market activity in relation to public policy. It is possible to argue that career guidance is both difficult to charge for (see Section 2.2) and, as Watts (1995) argues, is “worthy” both for its benefits to social mobility and because of its strategic importance in lubricating the learning and labour markets.

In conceptualising these issues, Watts (1991) has argued that career guidance can have a role as a *market-maker*: a means of making the labour market, and the learning market, work more effectively by ensuring that individuals within these markets have access to market information and are able to read market signals. Watts (1995) further argues that the concept of career guidance as a *market-maker* is logically superordinate to the notion of a *market or quasi-market in career guidance*. Accordingly, the marketisation of career support is only justifiable to the extent that it reinforces and assures its market-making role.

Discussion about the appropriate extent of marketisation masks some of the subtleties that exist in the interface between the public sector and market mechanisms. Despite successive government’s interests in marketisation, Le Grand (1991) has argued that it was not until the late 1980s that (with the major exception of council houses) market ideas were applied in earnest to the public sector. On the whole, the approach that was then taken in marketising the public sector was not for government to withdraw and hand over the cost of provision to consumers: rather it was the creation of a series of mechanisms for outsourcing of service provision that

have been described as the creation of quasi-markets. These quasi-market approaches have been influential across the UK public sector and have been pursued strongly within the field of career support, particularly in relation to professional career guidance.

Such quasi-markets operate in two main ways: through contracts (in which governments effectively manage the outsourced market through competitive tendering processes); and through vouchers (in which governments seek to empower consumer choice). Experiments in both were introduced in the UK in the 1990s, with mixed effects (Watts, 1995). The concept of vouchers has been discontinued, but quasi-market contracts have continued to be used extensively in, for example, the Connexions service (Watts & McGowan, 2007, appendix 3) and the new Next Step service. These kinds of competitive tendering approaches do little to increase the choice of the individual consumer, but rather provide (in theory at least) a mechanism for government to manage the cost-effective delivery of services by a range of private-sector providers.

Our research has not focused in detail on the management of this public-sector quasi-market, but it is an important part of the market landscape. We will briefly examine its functioning in Section 5.1.

How policy can frame the career support market

One of the key questions which this report seeks to address is how public policy can better enable individuals to draw down both the individual and social benefits from the career support market. As the discussion so far has shown, the development of this market has been highly influenced by the interventions of policy-makers. In the UK, much (probably most) of what is understood by consumers as career support is funded and regulated by the public sector. However, these public-sector services compete in the career support market with a range of services funded through other means which are largely unregulated.

Government unavoidably exercises considerable control over the section of the career support market that it directly funds. It would be possible to see this as fulfilling the government responsibility described by the OECD (2004a) and Watts, Hughes & Wood (2005) as “compensating for market failure”. However, this would be understating the role that the state has played in the development of the career support market. Since 1910, central and local government have largely driven its development. The consolidation of their interests in 1948 with the creation of the Youth Employment Service brought into being a public career support service that is still recognisable today (Peck, 2004). It is difficult to imagine what kind of career support market would have developed without this kind of government intervention, but it is highly likely that it would have taken a very different path. Given this history, it is perhaps more accurate to argue that for many years the non-government-funded elements of the career support market were compensating for the limitations of the public sector, rather than the other way round.

Given the state of development of the non-government-funded elements of the career support market and the general current pressures on the public sector, it may be helpful for policy-makers to take more account of the OECD formulation. In addition to compensating for market failure, this suggests that government should fulfil the roles of stimulating the career support market in order to build its capacity, and regulating the market and assuring the quality of services in this market. If policy-

makers are ready to accept these three principles in relation to the career support market, this means that there is a need for greater clarity about what comprises the career support market and closer scrutiny of the activities undertaken within it, to inform the nature of government intervention required. This section will explore these issues from the perspective of research undertaken into policy frameworks in six comparator countries: Australia, Canada, Germany, the Netherlands, New Zealand and the USA (these findings are presented in more detail in Appendix 1).

1.1.1 How other countries are stimulating the career support market in order to build its capacity

The role that government has played in Australia and Canada has many similarities to the UK. In both countries, the majority of the career support market remains publicly funded, although some of the funding for services to adults is channelled through a quasi-market in employment services. Actors within this quasi-market include a number of providers in the public, private and voluntary sectors. In Canada, there have also been attempts to stimulate the market in data and systems through the provision of funding to the private sector.

In contrast to these approaches, Germany has maintained provision of career support largely in the public sector (funded by a mix of government, employers and trade unions). While deregulation has enabled other players into the market, there has not been the growth of the same kind of public-sector quasi-market as in some of the other countries. Similarly, New Zealand offers an example of a public-funded autonomous public body being responsible for the delivery of career services without the existence of a quasi-market (though its delivery of direct services to individuals is much more limited than in Germany).

At the other end of the spectrum is the approach taking by the Netherlands, which has extensively privatised and deregulated career services in the anticipation that the private sector would be stimulated into filling the void. It seems clear that this approach has been detrimental to the availability of high-quality career support. Much the same was found when New Zealand attempted marketisation of its services in the 1990s, leading to its effective abandonment.

1.1.2 How other countries are regulating or assuring the quality of the career support market

In the area of market regulation, public policy has generally played an influencing and shaping role rather than a legislative one. In Australia, Canada and Germany, government has been working with professional associations and other career support market bodies to encourage the development of standards and regulations. In most of these cases, it is currently unclear what impact these processes are having at the level of practice.

A stronger approach to regulation has been adopted in Quebec, where has been a attempt to quality-assure the market by protecting the titles of career counsellor and guidance counsellor, thereby ensuring a minimum level of qualification (at master's level).

In contrast, Germany had deregulated its provision of career guidance. Up to 1998, the Federal Employment Service (funded by government, trade unions and

employers) was the only body legally entitled to provide career guidance. Following deregulation, however, no permit is now required for providing career guidance services per se, though the Federal Employment Service is able to prohibit their activity "if this becomes necessary in order to protect the persons seeking advice". In practice, no such case has ever been brought, and it is unclear how this power could be enforced.

1.1.3 How other countries are compensating for the failures of the career support market

The provision of high-quality baseline data (mainly labour market information, but also including other types of data) has generally been an area in which all six of our international comparators have sought to maintain a public-sector role in order to insure against the dangers of market failure.

In the case of the Canada and the USA in particular, such information is publicly available, but is also incorporated into a variety of web-based and other sources geared more strongly to the career seeker, which are funded in other ways. Thus O*NET (www.onetonline.org) in the USA offers high-quality baseline data but also makes these data-sets accessible in ways which are designed to stimulate their use in both commercial and non-commercial ways by the broader career support market.

In Australia, Germany, the Netherlands and New Zealand, on the other hand, the provision of a high-quality public careers information portal addressed to the needs of career seekers is viewed as the responsibility of public "government pays" services. The Australian government, for example, has funded the development of a high-quality national career information portal called MyFuture. This has proved popular and does not seem to have limited the growth of a broader online career support market with strong ties to opportunity providers (employers and learning providers).

In some European countries, indeed, the collaboration between different ministries and other organisations in the development of such a portal has been seen not just as a tool but as a powerful agent of change in the development of a more integrated career guidance system: a means through which service providers can transform their separate, sector-based and provider-centred provision into a user-centred lifelong guidance system, with the website (including the user's e-portfolio) conceptually at the centre, supported by co-ordinated sectoral provision (Watts, 2010).

The recent STEM Careers Review (Holman & Finegold, 2010) recommends that the UK should create "a single, comprehensive and constantly updated database and portal of careers opportunities and LMI across all employment sectors" (p.33). If government decides to pursue this proposal, there would be value in more detailed work looking at the operation of similar systems in other countries. In particular, the O*NET and MyFuture approaches would merit further study. Any such project in the UK would not be starting from scratch but rather would be examining ways to combine existing data sources such as those collected by the Sector Skills Councils (see GHK, 2010).

How technology is reshaping the career support market

There is an extensive literature that examines in more general terms how changes in technology are impacting on business models and the operation of markets. Books like the *Weightless World* (Coyle, 1997) and *Wikinomics* (Tapscott & Williams, 2007) focus on the reducing costs of market entry and the trend towards reduced marginal costs in areas such as publication and distribution. A key role of our project is to ascertain how far these arguments of market and business transformation hold up in relation to the career support market and whether they map out a trajectory for change.

While Coyle (1997) and Tapscott & Williams (2007) establish a useful vision for how technological changes are likely to transform business models, there is also a literature that examines these issues in more detail. This includes considerable discussion about how e-business models can be categorised, with a variety of different typologies being advanced (summarised in Pigneur, 2000, p.3). Wang (2007) argues that most e-business models can be organised under conventional business model categories (brokerage, advertising, infomediary, merchant, manufacturer, affiliate, community, subscription and utility).

However, if the categories remain much the same, the methods used within them can be new enough to represent a paradigm shift. Thus online auction site eBay broadly operates on a similar business model to traditional auction houses. But the lowering of advertising, space and dissemination costs, and the massive expansion in the audience for the service, necessitated a new way of doing business, based on community regulation rather than expert verification of saleable objects. Allied to these pragmatic developments in business organisation, there are also ideological and conceptual developments that have opened up new business possibilities. So Chesbrough (2006) argues that companies such as Procter & Gamble, IBM and Air Products have pursued “open innovation” approaches in which intellectual property and other forms of organisational knowledge are made available to a wider community in order to catalyse mutually beneficial innovation.

In another development, O´Reilly (2005) argues that Web 2.0 marks the end of the software release cycle in favour of continuous iterative development and what he describes as the need to treat users as co-developers. These kind of agile design processes can be criticised as providing consumers with services that are not market-ready, which then have to be debugged in response to complaints. However, it is undeniable that they offer a process which enables innovative and experimental products to reach the market very rapidly. As might be anticipated, our research suggests that the “government pays” model of career support provision is generally not operating within this kind of paradigm, but that other sections of the market are able to innovate more rapidly.

It is important to be critical of utopian arguments which claim that the relationship between consumer and producer have been fundamentally transformed by recent technological developments. However, it is also important to recognise that technological trends have reshaped markets, encouraging new entrants and enabling existing businesses to function in different ways. The rest of this section will examine how far some of these trends have impacted on the career support market.

Rapid market entry

The career support market that is described in this paper would have looked very different ten years ago. Technology has played a considerable role not only in allowing new players into the market but also in introducing new types of players and new types of services. Previously, the ability to participate in the career support market relied on an actor's ability either to deliver a service or to undertake publishing and dissemination activities. All of these were expensive: all required the actor to either possess or rapidly build an infrastructure. The growth of new technologies means that this is no longer the case, since new entrants to the career support market can use the internet to provide them both with widespread access to an audience and with a readymade means through which information and services can be delivered.

The stakeholder interviews conducted as part of our research demonstrated the dynamic nature of this market. Most of the organisations to which we spoke that were primarily involved in delivering services utilising technology were new companies established on the basis of a new idea or a perceived market gap; those like Graduate Prospects which had made the transition from traditional publishing/dissemination-based approaches and had reorganised their business around online delivery were less common. An example of the former is BestCourse4Me, which was developed from an idea generated at an international conference by an academic (Professor Anna Vignoles), a politician (David Willetts) and philanthropic entrepreneurs (Ros and Steve Edwards). The articulation of the idea led to the technical build of the site which took a few weeks, followed by its launch in February 2010; it has to date received 36,000 visits. WikiJob is a further example which developed from an idea to a functioning site in a matter of days. Edward Mellett (one of the site's founders) said, when interviewed for this project: "it wasn't very good when we started, but it got better quickly. You can do things on the internet very cheaply and as the traffic on the site grew we worked on it more and more." The company rapidly expanded to employ five members of staff, funded by advertising revenue secured on the evidence of 250,000 users every month. icould and Horsesmouth provide further examples of rapid entry into a market by a new player.

Increasing efficiency

One of the key reasons that new organisations are able readily to enter the career support market is because the web allows organisations to operate with high impact yet on relatively low costs. icould, BestCourse4Me, Horsesmouth and WikiJob all operate on low levels of staffing and yet can claim high levels of usage (Table 1).

BestCourse4Me has required approximately £100k to develop, some of which has been in the form of in-kind contributions from Microsoft; it employs a project manager who identifies work priorities and sub-contracts accordingly. Horsesmouth requires higher levels of resourcing, since it uses a mix of computer-mediated interactions and (more expensive) human-mediated interactions. The organisation's original development was funded by the Edge Foundation; subsequently, funding was secured from V (the youth volunteering organisation) to launch the site to the 16-25 market as a new volunteering opportunity. The site is now funded through partnerships with organisations seeking to host mentors or promote mentoring related to specific issues.

Table 1: Unique users and staffing in some online career support organisations

Website	Unique users per month	FTE staff
BestCourse4Me	6,000	1 project manager Plus sub-contractors and sponsor support
icould	10,000	4 (but backed by CRAC which provides some additional infrastructure)
Horsesmouth	30,000-60,000	3 paid staff 1 voluntary Chief Executive 6 trained moderators who are paid depending on site traffic (currently full-time) 4 full-time partnership managers (outsourced)
WikiJob	250,000	5 staff (1 IT support, 3 sales, 1 business development)

The figures in Table 1 demonstrate considerable usage of the sites described. Web statistics can be problematic if presented in raw forms. Understanding the difference between hits, unique users, page views, time on site and the various other indicators that are measured requires some care: each of these statistics measures something different, and the most appropriate will depend on the nature of the site. Furthermore, considerable analytical skill is needed to understand the role of non-human agents in generating hits and to identify where web statistics indicate sites from which people exit immediately or that they find confusing. Quality is at least as important as quality, but much more challenging to ascertain. So, for example, icould were keen to stress that their average user was staying on the site for around six minutes (or the length of two icould films) and that they could therefore claim not just volume but also that users were engaging with the site content.

Perhaps most importantly of all, it is necessary to recognise that web statistics cannot be equated to the footfall in a face-to-face service. It should however be possible to use the web statistics collected by a variety of actors in the career support market to increase our understanding of the online consumer of career services. The purpose here is not to compare these kinds of services with the efficiency of existing face-to-face career services. Web-based services enable the delivery of services in a highly efficient way, but they are usually delivering to different clients and using a different service paradigm. On the whole, however, businesses centred on a web-based paradigm tend to avoid moving into areas of the market in which their mass-delivery models do not function. So, while web-based technologies offer considerable efficiencies in the delivery of information, there is less evidence that they can have such an impact in the delivery of professional/client interactions (although an innovative example from Canada will be discussed in Section 4.4).

The ability to connect with clients and engage them in the services that are available is crucial to the effectiveness of both online and face-to-face services. As argued in Section 2.2, one of the principal challenges for consumers in the career support market is their understanding of what is available and from where it can be accessed. The ability to use low-cost web-based marketing, and/or more expensive mass-media marketing, therefore offers potential for all services to increase their impact and effectiveness. However, some face-to-face services, particularly where funded

by the public sector, are cautious about marketing themselves, for fear of raising expectations and demands for services that cannot be met through dwindling resources.

Some organisations see their mission as raising the engagement of their students with career services earlier in their studies. The Open University, for example, has 250,000 students and only 13 regionally-based careers advisers, many of whom are part-time. Their use of forums and a range of web-based resources is a means to engage students in thinking about career development and provide them with tools and resources to do so. Around 15,000 individuals have used their web-based services in the past year. Again, the University of Manchester Careers Service currently market their portfolio of services via all-student emails, but are experimenting with developing a more sophisticated school-based strategy built around Interface, a career-oriented client management information system which reads across student data from their registry. This allows more tailored and school-specific careers messages to be delivered to students via a series of blogs and tweets, and a Facebook campaign which is currently in development by student interns to offer a peer-to-peer perspective.

It is therefore not only new actors that have been able to increase efficiency through the use of technology. For existing players in the career support market, the application of ICT has often delivered increased efficiency through the development of project management and back-office functions. These improvements in systems can lead to more effective allocation of clients and efficient appointment management systems. Furthermore, the regular analysis and use of client management information systems can provide a strategic approach to managing a whole service. Nottingham and Nottinghamshire Futures has two operating arms: one for the service for young people; and a second, Guideline, for adults. The organisation views the active and daily use of the client management system as the single most important reason why their NEET figures are lower than in some other Connexions companies.

The efficiency improvements demonstrated by organisations like Nottingham and Nottinghamshire Futures is taken to its logical conclusion in the Next Step phone service run by BSS. The ability to manage clients and allocate to them to advisors with minimal dead time is clearly much easier when running a phone service. Nonetheless, the organisation’s ability to manage 600,000 calls and 100,000 emails per year with 200 advisers is impressive, as is the ability to use call-centre management techniques such as the recording of interviews to quality-assure the services that are delivered.

The current (2010-11) Next Step capacity to handle requests for face-to-face information and advice is to help 700,000 individuals by delivering over a million advice sessions. Alongside this, the telephone channel is expected to increase its volume of calls to handle a million calls per annum and 250,000 emails seeking advice. It is also anticipated that the online channel of the service will have the capacity to handle up to 20 million automated online sessions per annum (DBIS, 2010a).

In the present context of economic restructuring, it can be anticipated that the demand for career support is likely to increase, but within the context of diminishing resources. While the adoption of ICT is not being driven by a desire to replace face-to-face services, it is seen as a way to increase the take-up of career support services and to target face-to-face services more effectively to those who need them most.

Enhancing services

In addition to increasing efficiency, other changes have been evident in the behaviours of existing players. In some cases this has taken the form of the development of new services alongside traditional means of developing career information. For example, LawCareers.net is run by a publishing company which produces materials for the legal profession. They started publishing hard-copy editions of opportunities of postgraduate training contracts offered by all of the leading legal practices in the country. In making this material available online, a team of six people have developed a site and a service that provides information, but also provides undergraduates with regular labour market insights, an e-portfolio tool (through a free on-line account) and a newsletter. Their database of users extends to 22,000 members, which represents a substantial proportion of the undergraduate and postgraduate population of these courses, with 4 million user sessions each year. The web-based information and advice service has enhanced the information available, but only in the past couple of years has it replaced the printed information.

A recent European report (Cedefop, 2010) on providing support for redundant workers emphasises the role that career guidance can play alongside a number of other actions and interventions as part of outplacement work. Penna offers outplacement services for individuals, ranging from senior managers through to "blue-collar" workers, who face redundancy. Their services cover around 35,000 individuals each year. Their use of ICT has changed their business in several ways. Firstly, they have increasingly been using phone-based career support sessions in response to client demand, from people who did not want to travel for an hour or more to meet an advisor at one of Penna's 38 regional offices; this has contributed to a scaling down of their physical presence to the current number of 12 offices. In addition, the development of a web-based resource called PennaSunrise allows the process to be more self-managed and self-directed by the client, who can access a wide range of resources including psychometric tools and other exercises that they can complete between appointments. The on-line element is used to enhance and inform the reflection and learning of individuals as they move through their career transition.

Nottinghamshire Futures is an example of a "government pays" services that has developed a range of innovative ICT-based services including an e-portfolio and progression planning tool (Passportfolio.com) and a device to support people thinking about the world of work (Kangaroo). A further example is CareersWales.com, which is an integral part of the all-age service that has been developed in Wales. It provides both a means of delivering the service and also part of the evidence that the service is reaching individuals and organisations. The e-portfolio is the spine of the service: young people engage with this in Year 9 for their option choices, and then in Year 11 use it again to develop their CV. They can subsequently maintain contact with the service throughout their lives.

CareersWales present their service as a multi-channel one in which services are available via phone, web and face-to-face channels. This has enabled the organisation to extend its reach (efficiency) but also to develop new types of interaction that did not previously exist (enhancement). The user data (Table 2) demonstrate that all three of these channels are widely used.

In addition, CareersWales.com supports the Welsh Assembly Government's 14-19 developments by providing an online option-choice facility and support process for schools and pupils. The Welsh Assembly Government is able to use the information

to confirm that the key stage 4 legal requirement of 30 option choices per school is being offered. It also recently piloted the development of the Apprenticeship Management Service by integrating it into the network of other provision overseen by Careers Wales.

Table 2: Use of different Careers Wales channels (1/4/09-31/3/10)

35,041	Calls to the telephone service
210,282 72,531	Face-to-face sessions with young people Face-to-face sessions with adults
12,667,189	"Not logged in" web-page views (1/8/09 – 31/7/10)

Enabling the development of new paradigms

Much careers work is discussed under the headings of information, advice and guidance (IAG). In fact, careers work has always utilised much broader delivery paradigms than this suggests. Careers work involved a range of different educational and counselling techniques and interventions, as the OECD definition of career guidance cited in Section 1.2 demonstrates. Nonetheless, the development of online provision has enabled further innovation, extending existing notions about what can be considered as lying within the careers work paradigm.

As an example, Horsesmouth offer an online coaching and mentoring network with a strong, but not exclusive, focus on career. The service employs a number of mediators who ensure that the service remains safe and anonymous. However, all of the interactions within the Horsesmouth environment are between volunteer career informants who have signed up to deliver or receive "mentoring". Its representatives argue that because the service exists outside a professional career service paradigm, it has been difficult to secure public funding. Evidence presented by the organisation suggests that the site is extensively used and found useful by those who use it. Its claim to quality is based on its ability to give people safe access to the experiences of others who have already followed the career path in which one is interested. Good careers work has often involved providing access of this kind; some has always operated informally. Technology has enabled its availability to be massively expanded, in a managed way, without a need for direct mediation from career professionals.

Horsesmouth also argue that the functionality and usability offered by their site enable the experience to be tailored to the individual needs of the user (what Hooley, Hutchinson and Watts (2010) referred to as "individualisation"). The ability to provide individuals with their own feeds of information, filing systems and publishing tools transform the experience of engaging with career support into a much more active process of co-production. This trend towards a user-configurable experience was also found in a number of the other organisations/sites examined for this research. In general if organisations were not already providing individualised experiences for their clients, they were planning to do so in the near future.

A second example of innovation is provided by WikiJob. Like Horsesmouth, its claim to quality is not based on professional qualifications or expertise. WikiJob is a good example of the "community" and "collectivising knowledge" trends identified in *Careering through the Web* (Hooley, Hutchinson & Watts, 2010), in that the service offered by the site is essentially a way of distilling expertise from a diverse range of

participants (job seekers, recent employees, employers and careers professionals). The site cannot claim to be impartial within the professional definition of the term, but its function as an aggregator and a space within which subjective truths are contested does mean that most of the time the information and advice offered on the site achieve balance and trustworthiness.

A third example of a technology-driven paradigm shift is offered by Training Innovations (Tii) in Canada (discussed in more detail in Appendix 1). This service delivers career guidance within an online learning environment. Clients who approach the service undergo a triage process similar to those used in other career services. Some clients are directed towards online rather than face-to-face guidance (this might be for a range of reasons, including geographical location). The online guidance offered allows clients to move between one-to-one interactions with careers professionals, pre-prepared generic information and interactions with peers. The seamlessness of this environment increases the number of clients that can be managed by a careers professional, but also shifts the nature of the guidance experience, making it more flexible, able to harness peer learning communities and to develop a more sustained engagement between professional and client. This service represents a paradigm shift which requires a different kind of professional intervention and a willingness to quantify targets and impact measures in a different way.

The business models that underpin the career support market

A mapping of the actors within the career support market needs to take account of issues related to quality and market segment served and to note the mechanism through which the service is funded. These three issues of funding, quality and access have been the main lenses through which business models are being examined in this project. The question of ”who pays” seems to be the most critical of these questions, and the one that in many ways determines the kinds of answers that are given to the other questions.

Public funding still seems to fund the majority of career support services in all of the comparator countries examined in this study. Where this has been withdrawn, as in the Netherlands, the provision of careers support has been significantly reduced. Within this basic finding, there is considerable variation in what is provided by the public sector and how. But the provision of baseline publicly collected LMI seems to be the responsibility of government in all the comparator countries, and in four of the six countries this extends to the provision of a high-quality careers information portal (see Section 3.3.3).

Despite the central importance of public-sector funding in all comparator countries, it is important to recognise that career support is also funded in a range of other ways. It is possible to identify five main ways in which services are paid for:

- Government pays.
- Charitable body pays.
- Individuals pay.
- Opportunity providers (employers or learning providers) pay.
- Career support services are offered as an embedded part of a broader experience, e.g. education or employment.

How a service is paid for is a key element in what is delivered and how. Who pays also has a major impact on how the service employs technology. One way to conceive this is to note the difference between the customers of a service and its clients. The customer is the individual or organisation that is paying for the service: they are likely to exert pressure on the nature of the service and the outcomes it creates. The client is the individual who is actually receiving the career support. In some cases, where the client pays, the customer and the client are one and the same. But in most career support provision, this is not the case. Where the customer and the client are different, there is the possibility for disjuncture. In such cases, an important policy issue is how transparent the interests of the customer are and how easy it is for the client to discover them.

Funding model 1: Government pays

Public funders support a wide range of career support services and use diverse mechanisms to fund these services. This remains the largest segment of the UK career support market in general, and of professional career guidance provision in

particular. Our international comparisons suggest that public funding similarly plays a crucial role in all comparator countries. Where the government is the customer, it is able to define the priorities for the career support services that it funds. In the UK, this has resulted in services that tend to be strongly focused on priority groups (currently, young people and low-skill groups).

As part of the present study, we spoke to a wide cross-section of public-sector providers and also drew on the lessons offered by the public sector in other countries. Stakeholders in the UK who were interviewed included representatives of two Connexions companies, a Next Step provider, the Next Step phone and email channel, JobcentrePlus, Careers Wales and Careers Scotland.

In terms of public-sector services' use of technology, it is possible to see some services being offered across all the areas distinguished in *Careering through the Web* (Hooley, Hutchinson & Watts, 2010, p.3). Most public-sector career services provide vacancy information, LMI and job-seeking advice via their websites: there is a case for looking at how this range of public-sector web provision is operating, as there is the possibility of some unnecessary overlap which could helpfully be rationalised. There is also considerable use of automated interaction tools, particularly interest inventories such as CASCAiD or Axia Interactive's suite of careers tools. More innovative automated interaction tools also exist, such as the e-portfolio tools developed by Nottingham and Nottinghamshire Futures and by Careers Wales. Finally, it is also possible to see public-sector services using technology to deliver communication-based interactions by phone and email. In the main, however, these are currently confined to the one-to-one paradigm, with very limited experiments in the one-to-many and many-to-many forms of communication.

Stakeholders described their experience of operating within the public sector as a world of competitive tendering, tightly defined metrics and inspection regimes. This is linked to the development of quasi-markets in such provision (see Section 3.2). It means that while public-sector career services may not be operating in a conventional market, their aims and outputs tend to be highly responsive to pressures from funders.

An important outcome of the current funding mechanism for public-sector careers services is to focus their attention on the delivery of targets. These are often set within a pre-existing service paradigm, and can be defined in terms of high volumes of clients supported with quality-assured services, or for the delivery of services to achieve broader social and economic goals. Where technology is employed, it is generally used to deliver greater efficiency, as discussed in Section 4.2.

There is also a cultural expectation that the priority target groups – young people, and adults with low skills – engage with technology in anticipated and predictable ways. Thus people with few qualifications would not be expected to be digitally literate, while young people are expected to behave as "digital natives" (Prensky, 2001; see discussion in Bimrose & Barnes, 2010). Even if these assumptions currently hold, the trends in technology use suggest that they are likely to change, and there are also good reasons for recognising that people often use technology creatively to develop solutions to their problems, as Marschalek & Unterfrauner (2009) found in relation to marginalised young people and Roberson & Nardi (2010) with homeless people. Yet this approach to market segmentation informs both the commissioning and the delivery of services. Consequently, there remains the expectation that, for example, adult services for low-skilled workers should always be based on a face-to-face paradigm. Fresh approaches to using new technologies tend

not to be fully explored because of this cultural expectation of what particular client groups need and want.

The efficient but target-driven service paradigm that exists within the “government pays” model has a tendency to reduce the space for innovative practice. Organisations focused on the delivery of one or two government-funded career support contracts are likely to concentrate their innovative energies large-scale technology projects driven in response to targets, e.g. the introduction of a new customer management system. There is little evidence in such organisations of practitioners being allowed to experiment in a bottom-up way. This may mean that opportunities for rethinking service paradigms and utilising new technology creatively are being lost. More entrepreneurial companies which combine funding from government with funding from other sources have been able to innovate through securing funding which was explicitly designed to enable innovation and experimentation. However, their ability to transfer practice from these projects into mainstream service delivery funded under existing service paradigms is more problematic.

Another issue that has impeded technical innovation within some public-sector careers companies is the issue of organisational firewalls and internet policies. Many organisations do not allow the use of social media services such as Facebook by staff. The decision to restrict access to certain sites has been taken for a range of reasons, including safeguarding and performance management. However, institutional firewalls are frequently blunt tools that exclude a wider range of sites than have been consciously prohibited. It would be useful to conduct further research into the use of prohibitive internet policies both within and outside the public sector to see how such decisions are made and implemented, and their possible unintended consequences in making practitioner innovation more difficult.

The government-supported section of the market is thus complex, with career support being funded through a range of government departments to a variety of delivery organisations. The operation of this market can have further unintended consequences, such as several organisations seeking to support one client group (e.g. ex-offenders), duplication of activity (e.g. development of labour market information), or freely available diagnostic tools damaging the markets of commercial providers of similar products.

Funding model 2: Charitable body pays

Some light is thrown on the challenges of the public sector by examining how these issues play out with charitable funders. The organisations and activities that are funded through charitable bodies are likely to be of a different nature to those funded publicly. They tend to be fewer in volume, on a smaller scale and funded to provide a particular discrete service. They also tend to be innovative, experimental and visionary, utilising the potential of ICT to develop new services and shaping the market.

The outputs of charitable funding usually utilise technology either to deliver information or to provide access to some kind of automated interaction. Charitable funding does not normally provide sufficient resourcing for communication-based technologies where these communications are based around an interaction with a professional. However, Horsesmouth demonstrates that it is possible to deliver

career support based on technologically mediated human interactions if the support is built around volunteers rather than the provision of a professional/paid service.

Horsesmouth was developed with funding from V, the youth volunteering charity, and The Edge Foundation. The site has demonstrated that a model of career support built around volunteer career informants can be used widely and valued by users. It is currently funded through partnerships with organisations such as Channel Four, the National Apprenticeship Service, BIS and O2, who partner to use the organisation's platform, reputation and audience. Horsesmouth is functioning as a social business, but the current level of income is inadequate to assure its long-term sustainability. Similar issues with sustainability also apply to icould (www.icould.com), which is a website of around 1,000 careers stories. The site has been largely funded by a philanthropist, and provides an innovative and valuable resource. However, its sustainability is likely to rely on its ability to draw in other sources of funding to maintain, update and expand the resource.

The issue of impartiality affects providers of career support resources, and in particular those funded through both the "charitable body pays" and the "government pays" routes. Some organisations have adopted a strategic position that they will not seek funding via advertising on their sites because this might detract from their offer of objective, robust, and impartial support. In rejecting this potential source of revenue, they narrow the range of sustainable options.

The "charitable body pays" model seems to be an effective way to generate innovation and to move outside the professional career guidance paradigms to which the "government pays" career support tends to be more strongly wedded. However, there does not seem to be any evidence that charitable funding of career support services is able to sustain activity over the long term. Those responsible for icould and Horsesmouth both felt that they had delivered proof of their concepts through the use of philanthropic and charitable funding. If these services are to be sustained and continue to develop, they need either to draw in funding from the public sector or to develop alternative income streams. An important question for public policy-makers is therefore whether a policy of recognising and sustaining such innovation is a viable policy option.

Funding model 3: Individuals pay

There is relatively little hard evidence that makes it possible to ascertain the real size of the "individual pays" career support market. Despite a number of high-profile practitioners, particularly in the USA, the evidence collected from comparator countries does not suggest that these services are replacing "government pays" services in any substantial way anywhere in the world (some of the countries examined are those where such an effect would in principle seem most likely).

Furthermore, research in this project has not uncovered any evidence that individuals are paying to any significant extent for career support services in the UK, be they web-based services or otherwise, or that they would be willing to do so beyond a limited extent (see Appendix 2; also Taylor et al., 2005, chapter 12). There are a number of individuals or partnerships whose business is to provide a range of career support services from CV writing to job-search support, from interview techniques to career exploration. Some of this provision uses ICT as a communication medium to deliver a guidance service: so, for example, face-to-face meetings are being replaced

by Skype interactions, or diagnostic tools are now being delivered via the web with feedback being given by email or telephone.

During the project we spoke to two private practitioners who offered “individuals pay” services. Both were successful, but did not employ many staff, instead using freelancers to broaden their offer and deal with capacity issues.

An interesting alternative example is offered by The Careers Group at the University of London, which offers “individuals pay” services as part of its much larger career support business. Like the other players in the “individuals pay” segment of the market, The Careers Group attracts clientele both through reputation and referral; however, it also offers a GradClub membership scheme for the University’s recent graduates and has arrangements with other membership organisations.

A further example is Inspiring Futures, which offers “individuals pay” services to parents alongside its services to schools (hitherto, mainly independent and international schools). The latter include on-line resources, tests, e-portfolios and email communication with careers advisers.

A mass market for “individuals pay” approaches has been trialled by a careers technology company which, similarly, sells services to a range of careers and education providers. This company attempted to launch an ”individual pays” version of its career matching tool with a substantial advertising campaign, but the experiment did not prove successful and the company estimates that it only sells about one licence a week in this way. It is possible that apps for the iPhone and other smartphones will prove to be a more successful way to market career products to users. However, the career-oriented apps that have been investigated so far have tended to be funded by opportunity providers rather than by the end-user. The careers technology company in question has also investigated the profitability of iPhone apps and decided to move into this arena with some caution. The apps market is still developing but there is some concern as to its profitability outside a few very high profile apps (Ahlund, 2010). There is certainly no evidence as yet of major market demand for “individuals pay” career support apps.

Commercial providers are concerned to find that potential individual customers are discouraged from paying for a service when it appears that the web offers them similar services for free. It was noted by at least two stakeholders that the already limited market for their diagnostic tools was eroded by tools on government-supported sites that appeared to offer them the same outcome.

Although providers are not selling career support over the web to consumers, the “individuals pay” market generally seems to use technology effectively as a marketing tool. One careers coach estimated that 80% of their business was from their website, and that its maintenance and annual refreshment was a core part of their business strategy. Many careers coaches maintain blogs through which they provide free career support as a way of attracting people to their paid services. One careers coach to whom we spoke saw his blog as a way both of raising his company’s profile and of providing some services at a low cost or for free. This company had also experimented with selling e-books based on its advice and coaching model. It was able to bring these products to market at low cost and was beginning to sell some copies. However, the sale of e-books remained a peripheral part of a business that was primarily based around a face-to-face coaching model.

Funding model 4: Opportunity providers pay

Providers of both learning and work opportunities have a need to recruit individuals to the opportunities that they are providing. This recruitment need has a close association and overlap with career support services. Many of the career support tools and services that exist on the web have emerged out of this overlap. The core need of an opportunity provider is to fill the opportunities that they have available. However, very few of the sites are simply listings of opportunities. In order to achieve the outcome of the intervention – people being recruited to posts or entering training or learning opportunities – individuals need to be attracted to use the site, and may be more likely to do so if some of the content there addresses their needs in ways which go beyond simple recruitment information. With this in mind, career support services operating in the ”opportunity provider pays” model have developed a wide range of different approaches. Some have created content authored by careers professionals or by journalists/feature writers; others have taken a user-generated approach to the development of career support sites. Still others have found a market niche through the creation of some kind of app or automated online service.

Employers and learning providers have developed their career support offer for a range of reasons. In some cases it has been a strategic and deliberate activity to add value to the site both by responding to consumer demand and, in so doing, increasing the attractiveness of the site to potential recruits. Other sites have developed more organically and add career exploration and discussion elements as technologies become available and as site users request it. But in all cases the primary driver for the application of technology to provide career support tools is to gain access to a target market. In some cases this is highly successful: several sites have very high volumes of usage and are able to use technology in a strong and robust way.

This funding model seems to have been highly effective in grasping new technologies and identifying their potential for career support. Thus WikiJob (http://www.WikiJob.co.uk/) launched a successful website based around Web 2.0 technologies within days of having the original idea. Within a year of the original launch this was attracting income from employers. Similarly, Monster (http://www.monster.co.uk/) has established a presence within Facebook, YouTube and Twitter, and makes its content available through these channels as well as through its main website. TwitJobSearch (http://www.twitjobsearch.com/) provides an application that aggregates Twitter feeds and then mashes this together with map data.

The motivation for ”opportunity provider pays” services to provide career-related information and advice is that the availability of career support acts as a ”hook” which engages people to visit and return to the site and therefore to be exposed to the recruitment message. Whether this distorts in any way the information that is provided, in terms of its range and its content, is an important issue.

The “opportunity provider pays” services tend to emphasise information and automated interaction: none of the services that we have examined so far offers anything that is equivalent to a one-to-one professional career guidance/coaching service. Nevertheless, the information and advice provided on ”opportunity provider pays” websites cover a broadly similar range of topics to that provided by public-sector careers providers. The quality of the data, its provenance and its robustness have not been objectively assessed as part of this study; neither do site providers

always make explicit their quality-assurance processes. However, it is observable that some sites appear to outperform some of their public-sector equivalents in terms of the amount of content, the regularity of updates and the site's ability to engage its target audience.

Site managers were also aware of the need to ensure the integrity of the information and advice hosted on their site to maintain its reputation and frequency of use. Where advertising revenue is used to fund the site's development, the pages are constructed in such a way that a clear and transparent distinction is drawn between information and advertising. An example is provided by Graduate Prospects, which is a social business with strong links to the higher education career support sector. The business ethos of this site promotes the goal of impartial careers advice and consequently ensures that paid content and editorial content are separated in a transparent way. The same separation occurs, however, in Monster, the fully commercial recruitment site, which maintains clear distinctions (signposted through textual and graphical elements and through the positioning of content within the site's structure) between the career information and advice that is given and the vacancy-listing elements of the site.

The various websites in the "opportunity provider pays" segment of the market are repositories for a large range of freely available career information and advice. An important question this raises for the rest of the market is how this content can be best utilised and whether it replicates what is available elsewhere in the market or offers any distinctive perspectives. Related to this are questions about possible bias and how far the content offered on these sites is accurate, trustworthy and impartial.

The case of Graduate Prospects shows one way in which the ethos and branding of the site are likely to exert influence on how issues related to employer influence are handled. While Graduate Prospects draws its ethos from its connection with the career support profession, WikiJob draws its ethos from its commitment to social media. The social elements of WikiJob, its user-generated content and its communities of job-seekers are the site's key selling points, and this provides an alternate frame for handling ethical dilemmas. Because of its commitment to user-generated content and a corresponding unwillingness to edit and censor, the site will sometimes display content that is critical of employers who advertise on the site. The company has been able to continue to attract advertising from employers even when they are being criticised, because they are selling not just a conventional advertisement but a mechanism for engaging with a pool of potential recruits.

It is important to note that the "opportunity provider pays" services seem currently to be focused largely on the intermediate- to high-skills end of the labour market. Many of the services are specifically targeted at graduates or professionals. Even a more general service such as Monster provides far more opportunities for high-skill than lower-skill jobs. Thus, for example, in November 2010 the site's occupational categories were ranked in the following order (with current numbers of vacancies in brackets)[1]:

1. IT/Software Development (5,000+)
2. Sales/Business Development (5,000+)
3. Accounting/Finance (3,807)
4. Engineering (2,939)
5. Marketing/Product (2,164)
6. Customer Support (1,710)

[1] Figures from http://jobsearch.monster.co.uk/Browse.aspx (21st November 2010).

7.	Administrative/Clerical	(1,253)
8.	Business/Strategic Management	(1,181)
9.	Other	(1,003)
10.	Logistics/Transportation	(881)
11.	Human Resources	(840)
12.	Project/Programme Management	(730)
13.	Medical/Health	(712)
14.	Production/Operations	(585)
15.	Legal	(578)
16.	Installation/Maintenance/Repair	(526)
17.	R&D/Science	(516)
18.	Building Construction/Skilled Trades	(383)
19.	Quality Assurance	(339)
20.	Food Services/Hospitality	(338)
21.	Creative/Design	(328)
22.	Training/Instruction	(309)
23.	Security/Protective Services	(269)
24.	Editorial/Writing	(121)

The picture painted of the labour market by the vacancies available on Monster is clearly skewed towards IT, white-collar work and other high-skill occupations. Nevertheless, it is also notable that the site is serving those in some lower-skill occupations such as hospitality and some where internet use is unlikely to be a routine part of the role such as construction and installation/maintenance/repair.

Jobcentre Plus provides on-line vacancy information through the Directgov portal (www.direct.gov.uk). This site also provides job-seeking advice and career planning information which both overlaps with and includes signposts to other public-sector providers. The jobs database is extensive, but the categories under which vacancies are organised contrast markedly with those on Monster, indicating a primary focus on the low to intermediate skill areas[2]:

- Office
- Retail & sales
- Transportation & distribution
- Food, drink & hotels
- Arts, leisure & tourism
- Science, engineering and IT
- Security & armed forces
- Legal, financial & business
- Manufacturing
- Schools, education and training
- Construction
- Health and care services
- Agriculture, parks & animals
- Cleaning & environmental services

The online vacancy market is therefore serving the needs of a considerable range of users. Further research is needed to explore how well online vacancies across the board mirror the labour market as a whole. It seems likely that higher-skill areas are over-represented, but our research also shows that there is some online vacancy information on low-skill jobs. If recruitment follows other trends on the web, we might expect that online jobs boards will continue to broaden the segments of the market that they cover, as participation in the web expands.

An additional issue with the kinds of services provided through ”opportunity provider pays” models is that they tend to rely on individuals being reasonably self-sufficient

[2] http://jobseekers.direct.gov.uk/subjectmenu.aspx?sessionid=11ddb263-65d3-4394-a9fd-bf81451cd314&pid=1&o=1. (21st November 2010). Because of the way the Directgov site organises searches, it is not possible to provide numbers of vacancies in each of these categories.

and adept at using the web and managing information. There is little available through this route for those who lack digital literacy or who seek deeper professional career guidance interventions.

Funding model 5: Embedded

Finally, it is important to consider a funding model in which career support is seen as an integral part of a broader experience. For example, some employers feel that offering career development opportunities to their staff is an important part of a broader workforce development strategy, and that it offers a way to engage employees and to manage their progress within the organisation; though by no means all employers take this view (Cedefop, 2008).

Embedded career support may also be offered within an employment context as part of outplacement and redeployment activities, though this is commonly contracted out to external providers. Bolam (2010) in a report to the private-sector careers professional organisation ACP International estimated that the UK outplacement industry was worth upwards of £150 million. He further noted that many outplacement companies are also involved in the provision of organisational development services, which often have strong areas of overlap with career development.

In addition, some career support may be provided as part of membership of a professional association. For example, the Royal Society of Chemistry provides its own online 'careers gateway' (http://www.rsc.org/gateway/subject/careers/), organises an extensive careers events programme and provides members with access to one-to-one career support. Similarly, trade unions can provide locations for embedded career support, especially through the learning representatives that several unions have appointed (Alexandrou, 2009).

In much the same way, educational institutions commonly provide students with careers advice as an integral part of the educational experience, though the extent and quality of what is provided vary according to the priority attached to such activities. Some educational institutions take the view that supporting the development and implementation of career goals is an important educational goal, as well as supporting the motivation and retention of students; others do not. Such institutions, too, may use external providers for this purpose. Some of these are "government pays" providers, like Connexions, Careers Wales, Skills Development Scotland, and the Careers Service in Northern Ireland. Others, however, are funded in other ways. For example, Inspiring Futures, which currently operates primarily in international and independent schools, provides packages of careers education and support, which include on-line resources, tests, e-portfolios and email communication with careers advisers. The Coalition Government has indicated that it intends to develop a stronger market in such provision in England, with state schools choosing not only from the new all-age careers service but also from other providers (DBIS, 2010).

Our research focused particularly on higher education careers services where the embedded model of career support is well established. Practitioners in these services tend to be characterised by higher levels of educational qualifications than in the public services. While many professionals in higher education are qualified careers advisers, there are also alternative routes to these roles which enable other high-skill individuals to be brought in with associated skills and knowledge, such as

technological expertise, or experience in particular sectors which are of importance to the higher education institution. Our research suggests that the combination of high-skill individuals and a relatively loose set of performance measures means that these practitioners tend to be able to experiment with technology and rethink their delivery paradigms to a greater extent than in “government pays” services.

The challenge that all these services face is to make their career support offer more attractive to students earlier in their programmes of study. They need to engage students in their services and to connect with potential employers, whilst delivering quality information, advice and guidance in large volumes. This combination has resulted in considerable innovation related to the use of technology in career support. For example, as already noted, practitioners at the University of Manchester Careers Service have employed undergraduates as interns to develop social-marketing approaches to students (other services, too, have piloted the use of Twitter and Facebook to disseminate marketing about the careers service and vacancy information and advice). They also utilise mediated forums to deliver many-to-many careers support, and have developed learning modules to fit careers learning and employability skills alongside, or embedded within, students’ studies. Technology is used to market services, to complement provision and to reinforce learning alongside the ”traditional” offer of face-to-face guidance services. The service reports that the only activity they have discontinued as a result of their engagement with web-based and other new technologies is producing volumes of printed materials to hand out to students.

In higher education careers services, a bottom-up approach to innovation driven by practitioner interest is evident. This means that there is a diverse range of innovation upon which the sector can draw. However, the necessary flip sides of innovation are the risk of failure and the need to manage effectively the embedding of different innovations.

In other services, use of ICT is being driven by users, as in the case of PennaSunrise where the integration of tools and resources available online, within a structured process of support which includes face-to-face interaction (either on a one-to-one or a one-to-many basis), provides clients with the opportunity to self-manage and reflect on their own career learning. ICT is embedded in the offer in ways which respond to both client and customer need, whilst increasing efficiency for the career support organisation.

It is important to recognise that in some cases where career support services are embedded within organisations, the impartiality of this support may be constrained by the interests of the organisation. This applies, for example, where a school or an employer has an interest in encouraging students or employees to remain within the organisation, and tends accordingly to favour its own offerings at the expense of other alternatives (see e.g. Foskett, Dyke & Maringe, 2004). The existence of a professionalised workforce with a supportive professional association and a code of ethical practice can provide one bulwark against this limitation of embedded career support. Partiality was not evident in any of the resources described above, but is a possible constraint that needs to be borne in mind in reviewing the potential of this sector.

Implications for policy-makers

Given the complexity of the career support market and the vast and dynamic potential of new technologies, it is not easy to design a coherent public-policy response. What is clear is that there is no ICT "solution" to the "problem" of career support. The way forward is not likely to be through the purchase or development of a single range or suite of technological applications to be administered by a public-sector careers service. Rather, public policy needs to attend to the complex inter-relationship between different elements of the career support market and to examine the flow of innovation and services in and around this market.

The international comparisons undertaken as part of this study do not demonstrate that technology is currently providing any comparable career support market with a "magic bullet". While there is much good practice from which to learn, there is no evidence to suggest that the UK is lagging behind in its use of technology for career support. There is however considerable anticipation in all comparator countries about the potential value that new technologies may offer.

Indeed, as noted in Section 3.3.3, in some countries the notion of a single co-ordinated careers portal is being developed by a number of ministries and other organisations as a means of developing a more integrated career guidance system. In the UK, however, any initiative of this kind would need to be set within the context of the wider career support market as outlined in this report.

If public policy is conceived within this market paradigm, then a range of possible implications are worthy of further consideration. The conceptual model for public intervention in the career support market developed by OECD (2004a) and Watts, Hughes & Wood (2005) – the distinctions between stimulating and quality-assuring the market, and compensating for market failure – still seems an appropriate framework through which to discuss the policy implications of the research conducted as part of this study, though it needs to be reconfigured in the context of the market's use of new technologies.

Our earlier report *Careering through the Web* (Hooley, Hutchinson & Watts, 2010) made recommendations in three areas: enhancing digital literacy; developing mechanisms for quality assurance and recommendation; and supporting the technical upskilling of careers professionals. The issue of enhancing digital literacy and consumer understanding in general has been discussed in detail in Section 2, and is a central aspect of stimulating the market: without development in consumer understanding, the growth of the market is likely to be hampered or channelled in unhelpful directions. Alongside this, recommendations related to the upskilling of professionals and different quality-assurance/recommendation mechanisms are both discussed here as key aspects of quality-assuring the market.

Our study was conceived as being resource-neutral and was not tasked with developing recommendations about existing services or delivery paradigms. It has not been concerned with identifying whether face-to-face services or technology-based services are better or more efficient. This kind of polarisation is unhelpful and fails to recognise the subtle and fluid ways in which technology blends with, enhances and interweaves with the expertise and skills of career professionals. Our research does however suggest that there are efficiencies to be gained through the effective use of technology and that there are also areas in which new technologies

open up opportunities for new delivery paradigms that have the potential to enhance career support and to extend its reach.

It is also important to note here that the focus has been on how technology is being utilised at present within the career support market. Our report on *Careering through the Web* (Hooley, Hutchinson & Watts, 2010) has offered a more visionary discussion of what might be possible. There are technologies and approaches that may prove useful in the career support market which have yet to be exploited. For example, it was disappointing to find that there has so far been relatively little purposeful use of the mobile web in this market. Nonetheless, we hope that the recommendations discussed within this section could prove helpful as new technologies continue to be utilised and examined for their utility in the market.

Stimulating the career support market in order to build its capacity

This study has argued that the careers support market is vibrant, comprising a range of different players, and funded through a complex range of different mechanisms. It has also argued that this market is appropriately underpinned by considerable public investment. While there are some sections of the market to which public-sector funding is irrelevant, most services outside the public sector relate to and/or benefit from the existence of public-sector services in fairly direct ways. The idea of stimulating the market thus is not about replacing the public sector with alternative funding, but rather about exploring policy levers that can improve quality and access to the market while enabling the public sector to operate with increased cost-efficiency.

Technology has already played a role in transforming the market, supporting the entry of new players, increasing efficiency, enhancing services and opening up the possibility for new paradigms to be developed. As new technologies continue to be developed, it is likely that this market pluralism will increase. However, as our study has also argued, career support is not provided out of thin air, and all of the support services discussed here are paid for by a customer. In all cases that customer has an agenda which defines why and how they pay for services to be available. These services also have clients who are often separate from the customers, and whose own agendas do not necessarily match those of the customer. A key question for policy-makers is therefore how public policy should relate to these different players.

1.1.4 Growing the "individuals pay" and "embedded career support" segments of the market

One area of the career support market that is not currently well developed is the "individuals pay" segment. A key question examined was whether new technologies increase or decrease the likelihood of private profitability in the delivery of career services. In the case of "individuals pay" models, the internet is providing a cheap route to market that previously did not exist. Whether this has resulted in an increased use of "individuals pay" services by individuals is not clear. What is evident however is that "individuals pay" models remain confined to niche areas of the career support market both in the UK and in other comparable countries.

Another area of investigation was whether the provision of low-cost technological products such as smartphone apps or ebooks provided an alternative way to engage individuals in paying for careers services. While this remains an interesting area with

potential for growth, there was little evidence that it was currently significant either in business terms or in the level of career support delivered by such approaches.

The discussion of the limited nature of the "individuals pay" segment of the market does not necessarily create a case for government intervention. However, there is currently little understanding of why this aspect of the career support market is as restricted as it is. A related concern that is of more interest to policy-makers is whether there is the possibility for the development of hybrid funding models in which the individual makes a contribution towards career support services under certain circumstances. There would be value in further research to explore these issues in further detail and to develop possible hybrid strategies for policy-makers through which such career support might be funded.

An additional finding from this project is that where careers services are embedded as part of a wider experience, there seems to be a greater space for practitioner- or customer-driven innovation. Such services often employ agile design principles in experimenting and trialling innovation. In the case of higher education careers services, this culture of innovation is built around a public-sector ethos but supported by a performance management culture that is based on the setting of broad high-level targets rather than detailed monitoring focused narrowly on throughput volumes. Policy-makers may accordingly wish to consider whether practitioners within mainstream public-sector services could be enabled to innovate more creatively through changes to their performance management practices.

A related issue that is worthy of consideration is whether there are policy levers that could be utilised to incentivise the growth of the "embedded career support" segment of the market. It may be that inspection regimes in educational institutions or human resources standards could be harnessed to provide a greater emphasis on the provision of career support. Holman & Finegold (2010) recommend that Ofsted could be used in this way to drive change in schools (p.26).

Suggestions for policy-makers

- There would be benefit in conducting further research into the operation of the "individuals pay" career support market, to examine how to stimulate this market and how hybrid "government pays/individual pays" models might operate.
- Linked to this, it would also be valuable to explore further how technologically driven "individuals pay" services such as smartphone apps could contribute to the career support market.
- Government may wish to consider what policy levers exist to engage employers and learning providers in extending and improving the delivery of embedded career support.

1.1.5 Educating the consumer

The most obvious way in which government can play a role in stimulating market demand for careers support services is through education and marketing. As discussed in Section 2, there are significant limitations in the ways consumers access the career support market. Consumer understanding of the market and the choices that are available to them within it would benefit from a consistent campaign of education and marketing. In principle, the current proposals for the development of an all-age careers service in England provide an ideal opportunity for the development of such a campaign. If it could be linked to kitemarking of quality-assured provision, in the private and voluntary sectors as well as in the public sector,

this could significantly stimulate the market. The existing Matrix kitemark provides a useful staring-point, though it would need to be extended to cover a wider range of provision (see Section 6.2 below). Similarly, increasing consumer understanding of the differences between professional career guidance and other forms of career support could also be useful in stimulating informed market choices.

Allied to the poor consumer understanding of the career support market are issues related to the level of digital literacy of these consumers. Low levels of digital literacy appear to further narrow individuals' ability to access a range of career support, as well as placing wider limitations on their engagement with the worlds of work and learning. While the research undertaken into consumer behaviour as part of this project is limited, it suggests key areas in which further study would be useful. There may be ways to address some of the concerns about digital literacy through the technology itself, e.g. by an increased focus on search engine optimisation and on the dissemination of organisations' content through a range of different channels to increase their availability and impact. In addition, as we argued in *Careering through the Web* (Hooley, Hutchinson & Watts, 2010), digital literacy alongside broader information-handling skills need to be positioned as key components of career management skills. There may be value in making this more explicit when contracting with future career support providers.

Suggestions for policy-makers

- Government and the careers sector may wish to consider how education and marketing related to the career support market might stimulate consumer understanding and willingness to pay for career support.
- There may be value in viewing digital literacy as a career management skill and in providing enhanced opportunities for its development.

Regulating and assuring the quality of the career support market

Regulation can be used by governments to set minimum standards and to protect the vulnerable. In the case of career support, regulation is rarely discussed. As we have seen, technology has lowered the cost of entering the career support market as a provider, and the web accordingly offers providers a low-cost route to market. Anyone can set up a website offering their services and deliver those services from their home. No qualifications are required and there is no licence to practise. Whether there is a case for changing this laissez-faire situation is an issue that has periodically been discussed by governments and professional associations, most recently in the report of the Careers Profession Task Force (2010). There is room in the market for both professional career guidance and other forms of career support. However, in order to realise the full value of the market, there is a need to consider carefully how the careers profession can interact most effectively with the online services within the wider career support market.

Regardless of whether the sector seeks to move in this direction, there is clearly a need to upskill careers professionals to be able to take advantages of the opportunities that exist. In *Careering through the Web* (Hooley, Hutchinson & Watts, 2010) we argued that there was a need to upskill professionals as well as to disseminate the range of web-based practices that had been developed. This issue needs to be addressed in the development of professional standards for the careers profession.

Sites like Monster, Horsesmouth, icould and WikiJob make a claim to value that is distinct from that related to the reputation and standing of careers professionals. For recruitment sites such as Monster, their claim to value is based around their knowledge of recruitment processes, their capacity as a broker and their proximity to employers. For Horsesmouth and WikiJob, their claim to value is essentially their ability to broker interactions between the experienced and inexperienced, the knowledgeable and the less knowledgeable. In these cases, knowledge and expertise are conceived as being widely spread and not confined to a professional cadre. Also outside the professional paradigm, icould offers resources for career learning which are available to be accessed both within a professionally facilitated context, e.g. by careers advisers or teachers as part of career education, but also directly by individuals in their own informal learning and career exploration.

The career support market has opened up to allow the entry of new players. At present there is no regulation or quality assurance in place for many of these services. For careers professionals this is a matter of concern, which understandably leads to calls for increased regulation or quality assurance. Our report on *Careering through the Web* (Hooley, Hutchinson & Watts, 2010) identified this as a key need but recommended a broad-based approach to it. Many of the services that have been observed through the present research do not base their claim to value on the idea of professional career guidance. Quality criteria applied to them would need to be appropriate to the services they offer.

It is also important to be aware of the difficulty of regulating or quality-assuring the internet. Services are offered that are based in different countries and are usually not extracting any payment from the client. Furthermore, the rapidity of change in online resources is one of their key benefits. However, this does make it difficult to quality-assure information in traditional ways, since the information is likely to continue to change – and, in the case of services like WikiJob, to be changed by a range of non-quality-assured individuals. One approach would be to develop a quality-assured kitemark linked to a marketing campaign, as suggested in Section 6.1 above. However, this approach would require some resourcing, and would also require organisations in the career support market to see value to their business in acquiring such a kitemark.

An alternative quality-assurance approach would be to develop tools capable of aggregating and collectivising the experience of consumers and/or careers professionals. An example of how this might work is offered by Digg (http://digg.com), which is a social news website. The site offers users a mechanism for identifying news that might be of interest and then giving stories a high or low priority based on a voting system (digging or burying). A system like this has the value of being transparent, responsive and providing a filter for quality. There may be value in the provision of both consumer and professional versions of the results of such a system, so that people could choose between resources identified by people like them and by those with expertise. The maintenance of such a system could be a responsibility of public-sector services and would provide a mechanism for keeping practitioners engaged with new online developments. The Careers Group at the University of London have developed something along these lines with their Careers Tagged site (www.careerstagged.co.uk), which allows graduate job-seekers to share useful information using a social tagging approach.

The government can also act to quality-assure the market by ensuring that it is underpinned by high-quality core CLMI, possibly through a single portal where such information can be presented in an integrated user-oriented form. If a reliable public

information platform can be achieved, market innovation can be built on strong foundations.

A further approach to quality-assuring the market is available to the government through its role as funder. It can use commissioning rather than legal processes to regulate the services it supports, to steer the nature of their service paradigm and to ensure efficiency of service delivery, so setting standards for others. The Government's use of funding, targets and inspection has done this very deliberately: for example, with the delivery of telephone advice and guidance services that are efficient, achieve high volumes of usage and are constantly monitored using external evaluation to continuously improve service quality.

A drawback of relying on commissioning is that it tends to lock an organisation into a delivery paradigm based on past achievements. The ability of government-funded organisations to innovate and experiment using new technologies is compromised by longer decision-making chains and a precautionary culture. There could however be opportunities for government to support innovations and services that have developed outside its own commissioning and development processes and to bring them, or their practices, within its own delivery frameworks.

Assuring the quality of services is not only the preserve of government-funded career support services. Those developed under other funding models are equally concerned to ensure that their career support is of good quality, as this affects their credibility with employers and with individuals. Quality-assurance methods can however take different forms. So, for example, Horsesmouth uses six trained moderators to check the interactions on its site for language and potential abuses of the mentor/mentee relationship. Higher education careers services employ individuals from industrial sectors to ensure that the information and advice they offer is grounded in knowledge of the culture and traditions of particular sectors. Commercial service providers in both the primary and secondary career support markets were adamant that their services are of high quality and relevant to the needs and demands of their clients: they were different to, but not necessarily inferior to, the quality paradigms that prevail in government-funded services. Any attempt to introduce a quality kitemark would need to take account of these complexities.

Suggestions for policy-makers

- The careers sector may wish to explore ways of increasing the expertise and skills of careers practitioners, to enable them to creatively utilise new technologies in their practice.
- Relevant sector bodies may wish to explore the idea of developing a protected or chartered status for careers professionals (while recognising that not all value in the career support market is derived from professional status or expertise).
- The sector may also wish to examine the feasibility of a kitemark for web resources and to examine how online community-based approaches could be used to develop mechanisms to collectivise knowledge and judgements about where value resides within the career support market.
- There is likely to be value in ensuring that the market is underpinned by high-quality core CLMI. One way to present this would be through a single portal where such information can be presented in an integrated user-oriented form.
- Government and the sector may wish to consider further how the approach taken to commissioning ensures the appropriate balance exists between tight targets to drive efficiency and organisational/professional autonomy to facilitate innovation.

Compensating for the failures of the career support market

As suggested in Section 3.3, it can be difficult to conceive of the government's role in the career support market as one of compensating for market failure. The public sector has been so instrumental in the development of career support that it has traditionally been the non-publicly funded aspects of the market that have compensated for the limitations of the public-sector aspects.

This report has argued that the public sector is likely to continue to be a key funder of career support. International comparisons suggest that career support markets need to be underpinned by public-sector investment if they are to be high-quality and to provide support for all who need and/or want it. This "compensation for market failure" role can be seen as providing for those with weak ties to learning and labour markets. Such individuals cannot afford "individuals pays" services, do not have access to "embedded" career support, and are of little interest to the "opportunity providers pay" market. The provision of a safety net to these groups undoubtedly remains as an important role for government, as does the identification of other areas in which government may seek to target resources (e.g. recruitment of students to science, technology, engineering and mathematics (STEM) subjects).

This paper has argued that viewing career support as being provided through a market paradigm provides a strong conceptual framework for future developments. However, this market will need to be underpinned by public-sector investment and public-policy support. There is certainly little evidence to suggest that the "individuals pay" model is likely to be able to deliver much of the market beyond a high-skill/high-income niche. On the other hand, there is a vibrant range of provision which is funded by opportunity providers, and it is important that the government and public-sector providers engage with this provision in a serious way in order to build a stronger understanding of what its strengths and limitations are.

Opportunity providers are currently providing a range of services, some of which are popular, useful and of high quality. While on the whole they do not provide intensive person-to-person services, there are other areas where what they are providing is broadly similar to public-sector services, such as online advice on recruitment processes or occupational information. Government and public-sector services need to review this overlap, linked to considering the extent to which government resources are appropriately used in duplicating resources that are already in existence elsewhere. Issues relating to breadth of coverage and impartiality are relevant here, but need to be addressed in an informed and even-handed way. In essence, the issue is one of clarifying what the unique selling points and appropriate market segments of public-sector careers services should be.

A further area in which the concept of compensation for market failure is pertinent is the identification of innovation and investment in research and development where the market is unable or unlikely to provide this itself, e.g. in initiatives that cut across the lifecourse. In areas where the market is able to generate innovation but not to sustain it, policy-makers should consider how these innovations can be supported into the mainstream, using mechanisms such as funding, knowledge transfer and target setting. This might apply, for example, to some of the innovations in the "charitable body pays" segment of the career support market.

Suggestions for policy-makers

- There may be value in reframing the commissioning and delivery of "government pays" career support services to take more account of what is already available through other forms of funding of career support.
- There is value in ensuring that career support services are available to those who would not be able to access them through other funding mechanisms.
- Government and the careers sector may wish to explore how the market's current limited success in supporting and mainstreaming innovation could be improved.

Final words

This report has used the idea of the market to reconceptualise understanding of how career support is delivered in the UK. The existence of public-sector career support services remains essential, but its offer should be reviewed in the context of the wider career support market. We have aimed to show that the public sector will continue to have a critical and unique role to play, but that it cannot claim a monopoly over provision or value in this market. The growth of the internet has accelerated the diversification of the market by allowing entry to a diverse range of new players, many of whom have developed new and innovative ways to deliver career support.

These changes in the career support market clearly have implications for a range of different stakeholders. For government, we have argued that there is a need to use a range of tools to stimulate and quality-assure the market as well as to compensate for market failure. For public-sector careers providers, there may be value in re-evaluating and re-defining what their distinctive features and services are. For careers professionals, there is a need to re-evaluate some professional paradigms in the light of the opportunities offered by new technologies. In particular, there is also a need to engage with educating consumers of careers services in developing their digital literacy.

Finally, for consumers of career support, the market offers major opportunities. There is a greater range of services than ever before to help individuals in managing their careers wisely. Whether individuals are able to make the most of these opportunities will depend on their ability to become more informed about what they are consuming and to develop their digital literacy and ability to make discriminating judgements. Government and the key players in the career support market have a duty to shape the career support market in ways that facilitate the growth of informed consumers. But ultimately, responsibility for career management lies with the individual.

Appendix 1: International case studies

1. Introduction

1.1 These notes represent the results of initial investigations into the nature of the career support market in six countries, based on brief literature reviews plus one or two personal contacts in each country with relevant national experts (in several cases this has included a Skype interview). The main focus is on the market in career support in general and in career and labour market information (CLMI) in particular, and on the ways in which this is being changed by technology.

1.2 The countries include the four major OECD English-speaking countries outside the UK: Australia, Canada, New Zealand and the USA. The first three of these are part of the Commonwealth, with strong historical ties with the UK; the fourth, the USA, has always been a strong and internationally influential force in the career support field. The fifth and sixth countries – Germany and the Netherlands – represent contrasting cases within Europe: Germany as a large country with a strong tradition of centralised publicly-funded career support provision, which is now becoming somewhat more diversified; the Netherlands as a smaller country where marketisation of such provision has probably extended further than in any other European country.

1.3 Tentative conclusions from the information assembled to date include:

- All six countries seem to view the collection and public provision of CLMI as a public responsibility.
- In the case of the Canada and the USA, in particular, such information is publicly available, but is also incorporated into a variety of web-based and other sources geared more strongly to the career seeker, which are funded in other ways. In Australia, Germany, the Netherlands and New Zealand, on the other hand, the provision of a high-quality public careers information portal addressed to the needs of career seekers is viewed as the responsibility of public ”government pays” services.
- In several countries, including Australia, the Netherlands and New Zealand, career information resources related to particular occupational sectors are provided by sector bodies. The role of collective opportunity providers (e.g. the Rectors Conference in Germany for information on higher education) also needs to be noted.
- All countries also have a variety of other career information provided by private-sector providers, sometimes with contracts with the government (as in Germany) but often paid for by opportunity providers, by advertising and/or by end-users. Some countries, including Australia, Canada and the USA, have developed quality standards for such resources, though there can be difficulties in enforcing them.
- The arguments advanced by the OECD in Canada (see 3.7-3.10) on the limitations of an approach focused solely on provision of information, without attending to its effective utilisation, are worthy of attention.
- Most provision of professional personalised career support – either face-to-face or at a distance – is publicly funded. But its extent and nature vary across countries.

- In all countries, there is a private sector in professional personalised career support, but it is limited in scale and scope. Much of it is based on an 'employer pays' model; the extent of "individual pays" provision is much smaller. The current scope of the latter, and means through which it might be expanded, might be a fruitful area in which further research could be conducted.
- Efforts have been made in at least two countries – the Netherlands and New Zealand – to "privatise" such personalised career support more strongly. But in the case of New Zealand such efforts have been largely abandoned; while in the case of the Netherlands they are widely perceived as having led to the erosion and distortion of career support provision.
- In comparison with career support services in general, the contracting out of employment services (which usually include some career support services aimed mainly at the unemployed and those on social security) has proceeded further in several countries, including Australia, Canada and the Netherlands. In general, it is based on a "government pays" model, operating on a quasi-market basis through contracts and/or through vouchers (in which funding follows the individual).
- Ways in which the government can seek to quality-assure the market include through regulation (as to some extent in Germany – see 4.5-4.6), through registration of career practitioners (as in Canada, in Quebec – see 3.1), or through quality standards (as in Australia, for example, and as currently being developed in Canada and Germany).

2. Australia

2.1 A review by OECD (2002a) reported that, while most career development services were embedded within the public education system, the private sector was relatively strong in the career support field in Australia (though it was much less well-mapped than the public-sector services). In addition to careers publishers (see 1.3 below), it was estimated to include some 250 outplacement agencies and around 600 individuals/organisations offering career counselling to the general public. In general, the market seemed to be strongest in the case of outplacement services paid for by employers. Some organisations successfully combined such services with services paid for by individuals. Those working in sole practice reported that it was difficult to sustain a viable full-time practice on the basis of the fees they were able to charge.

2.2 The private sector had been given a considerable boost by government policies to contract out public services which were free to the user. Some of these, notably the Career Counselling Programme, were centrally concerned with career guidance; others, including the Job Network and the Jobs Pathways Programme, included career guidance elements among a wider range of education/employment-related services. In effect, successive governments had created a new market in employment services, comprising a variety of providers in the public, private and voluntary sectors, which overlapped with the emerging career guidance industry (see also Considine, 2001). Many of these providers had tendered successfully for participation in a number of the government programmes: some specialised in this work; others sought to incorporate it into a wider range of activities.

2.3 The OECD review found that much of the career information in Australia was based on partnerships between government and the private sector. The private-sector Good Guides Group, in particular, had contracts to supply a number of key products, including the *Job Guide* (supported by the government) which was disseminated to all schools, and the OZJAC computer-based information system

(owned by the Curriculum Corporation) which was also widely used in schools. The review also noted that:

- The Department of Employment and Workplace Relations had developed a number of publications and web-based resources in the careers field. These included information on education and training courses, on occupational descriptions, on labour-market trends in some 380 occupations (based on Departmental assessments and economic-modelling forecasts), and on job vacancies.
- There were a number of industry-specific websites which aimed to raise awareness and interest in careers in these industries. The Commonwealth-funded Career Information Industry Partnership Programme provided seed-money to encourage specified industries experiencing skill shortages to produce innovative and creative career information materials.
- Criticisms of current information provision included that it was sometimes inaccurate, that it was too biased towards professional careers, that it was too focused towards young people, that occupational classifications tended to be out-of-date and to omit newer occupations, and that there was a paucity of local information especially in rural and remote areas.

2.4 A major recent initiative had been the establishment of a National Career Information System, MyFuture (www.myfuture.edu.au), which was designed to provide a comprehensive web-based career exploration and information service for all Australians. This represented a significant collaborative venture between the Commonwealth and state governments (previously the states had adopted very different approaches to the delivery of career information), plus a variety of other partners. The development costs had been funded by the Commonwealth; recurrent costs were to be shared between the Commonwealth and the states.

2.5 The MyFuture website contains information on education and training opportunities and on occupations, including regional information on labour-market demand and on wages and salaries (drawn from census data). It also includes opportunities for users to assess their interests and capabilities and match these to potential occupations. There are sections designed to build the helping capacity of parents and other career 'influencers'. Attention is given to adult career development themes such as life balance and mid-life career change alongside the more familiar focus on employment search. A rationale paper published to accompany the launch of the system located it in relation to the wider processes of career guidance and career development (McMahon & Tatham, 2001).

2.6 Subsequently, the Career Industry Council of Australia, founded in 2003 as a consortium of the 12 main career development practitioner associations, has developed agreed national standards and principles for career development practices in Australia. These include national Guiding Principles for Career Development Services and Information Products (www.cica.org.au). It also performs other advocacy/influencing roles. Emails and a Skype conversation on 14.9.10 with Peter Tatham, Executive Director of CICA, indicated that the latter guidelines do not as yet include checklists or a matrix to make them readily usable.

2.7 Emails and a Skype interview on 15.9.10 with Suzanne Curyer, Program Director (Careers) of Education Services Australia indicated the following further developments since the OECD review:

- Around 2004/05, a new initiative was introduced: Career Advice Australia. Service providers were contracted to deliver career and transition services and to create partnerships within regions to facilitate school-to-work transitions.
- In 2007, following the election of the Labour Government, National Partnerships were established with the states and territories to deliver services to increase youth participation and attainment. These include career and transition planning.
- The Good Guides Group, now known as Hobsons Australia, is still delivering the *Job Guide* (see 2.3) and is contracted for the 2011, 2012 and 2013 editions.
- The Career Information Industry Partnership Programme (see 2.3) has been discontinued. National Career Industry Specialists were funded under the Career Advice Australia initiative, but their contracts were ended in 2008/09. Many were run by organisations which are still in existence, and some have continued to provide career information on their websites.
- Since MyFuture (see 2.5) was launched, its traffic has grown every year, with annual page requests increasing from just over 8.2 million in 2003 to 30.5 million in 2009. In 2009, the service was awarded Best Government Site as voted by readers of Australia's NetGuide magazine. Significant enhancements have included using emerging technologies to integrate additional interactive features such as occupational videos, audiocasts, audio-visual career quizzes and a mini career explorer. Within MyFuture, the Australian, state and territory governments funded a series of enhancements to My Guide, the personalised career exploration service released in January 2010. It now includes more career questionnaires, an image-based career interest test to support people with literacy needs, career plans that can be emailed to career practitioners or others, and virtual tours. The site is also being promoted to adult job seekers and career changers through the Australian Government's Experience Plus initiative, which includes telephone career services for people over 45 years old.
- With the increased popularity of the Internet, online job-vacancy sites are providing easy access to job descriptions, job-seeking advice and some career advice. Two of the major ones are www.seek.com.au and www.careerone.com.au – the latter is jointly owned by New Digital Media (which is News Limited's digital business, employing more than 500 people) and Monster.com.

2.8 Further points made by Peter Tatham (see 2.6 above) included:

- The Commonwealth government will shortly commence a review of all of its funded career development products and services.
- Programmes funded under national partnership agreements (e.g. the national partnership on youth attainment and transitions) have a goal of increasing student attainment and retention. As a consequence of this government priority, there has been a narrowing the focus of career development services. There are also signs of resistance to standards for career development services, mostly for cost-control reasons.

2.9 From these conversations, it seems that the potential of technology is not yet being fully utilised in the career support sector in Australia. The proposal to develop a national helpline – made in the 2002 OECD report – has not yet been implemented, except through the limited initiative outlined above. Much more use could also be made of mobile technologies. However, the Commonwealth government has recently

announced an A$43 billion fibre optic rollout of a national broadband network which, when completed, will enable far greater interactivity between users and web-based resources, and encourage more extensive usage of such resources.

2.10 A further information system commended recently by the UK City & Guilds Centre for Skills Development is SkillsOne, which is both a TV channel and a website (www.skillsone.com.au) that specifically promote the trades and vocational education and training. The Centre suggested that, for some reason, the UK seemed unable to make interactive websites work, perhaps because web designers do not get the mix right between defining the content and allowing the user to interact and add their own questions and responses. It reported that when it last engaged with the Australian stakeholders, they were looking to sell their models overseas, and that Canada was about to participate in a trial. It strongly advocated that the UK careers sector should explore this model.[3] Suzanne Curyer (see 2.7 above) added that the TV channel and website were initiatives of the Institute for Trade Skills Excellence. The Institute was discontinued following the end of its government funding, but its former Chief Executive, Brian Wexham, has sustained it. The Pay TV channel operates for half an hour every morning, and a lot of schools subscribe to it. The videos on the website are submitted by various groups, and are grouped by industry. Some cross-promotion is being established with MyFuture.

3. Canada

3.1 A review by OECD (2002b) indicated that the great majority of career support services were in the public domain – within the public educational system, or delivered and/or sponsored by government agencies. It noted the existence of a private sector in career support services, but acknowledged that it was limited in scope and scale. This sector comprised a variety of agencies providing services which in the main were paid for by individuals or by their employers. These included a substantial range of outplacement agencies that worked with individuals who had or were about to lose their jobs, often through restructuring or downsizing. They also included private practitioners who specialised in career counselling or offered it as one of a range of counselling and consultancy services (assessments for insurance compensation in injury/accident cases could be a lucrative sideline). Only in Quebec were the titles of career counsellor and guidance counsellor currently protected by law: of the 2,183 individuals who were officially registered there, 27% were in private practice on a full-time or part-time basis.

3.2 The OECD review reported some signs that the private sector might be increasing. This was driven at least in part by parents' awareness of the deficiencies of career guidance provision within the public school system. There was also a growth of interest in career coaching, which might comprise coaching in job-search skills or might involve a more long-term supportive relationship, usually for senior executives. On the other hand, one informant suggested that private-sector career counselling services were showing signs of decline, because of the growth of self-help materials, on-line information, and career development programmes in high schools.

3.3 The growth of both the private sector and (even more so) of the non-profit sector had also been stimulated by provincial governments, which increasingly were taking over the provision of employment services from the federal government. These services, including career development services, had been contracted out

[3] Note to UK Careers Sector Strategic Forum from Heidi Agbenyo, City & Guilds Centre for Skills Development, August 2010.

both to the community-based sector and to for-profit organisations (though profit margins tended to be limited). (Many of the third-party providers were a combination of for-profit and non-profit activities: when they won government contracts to deliver career and employment services, these were usually housed in the non-profit parts of their work.[4])

3.4 The collection and analysis of labour market information (LMI), however, represented an area where a clear leadership role had been maintained at federal level by Human Resources Development Canada (HRDC), based upon its legal responsibilities in this respect. This included responsibility for information on jobs, occupations, career paths and learning opportunities, as well as labour market trends. In addition to using its own internal resources to develop and disseminate this information, HRDC supported a number of partnerships with the provinces to co-ordinate their respective efforts in this area, including data-collection systems which, the OECD review stated, were rightly claimed to be among the best in the world.

3.5 The OECD review noted that one of the key products from HRDC's LMI work was *Job Futures*, which was extensively used by career development practitioners and their clients. It included supply/demand outlook projections by occupation and by field of study, and was accompanied by a guide to help practitioners in answering common LMI questions asked by clients making use of these materials. Henceforth these products were to be available in web-based form only, so easing the task of updating them. Provinces had also created their own parallel products.

3.6 The private sector also played a prominent role in the development and delivery of career information. Many leading publications and web-based products were produced by private companies. These might be funded by advertising, by charges to consumers, or in some cases by funding support from HRDC or Industry Canada – linked either to career and labour market information programmes or to learning technology programmes designed to encourage private investment in the application of technology to learning (including career development). The market for such products was largely unregulated, except in the case of the school system, where provincial ministries of education might review and identify selected career information products and services as 'approved learning resources' to be used with the official curriculum: this was done, for example, in British Columbia. The LMI Working Group of the Forum of Labour Market Ministers (FLMM) was developing some standards for information products, but it was unclear whether and how they would be enforced.

3.7 The OECD review noted that career and labour market information was clearly recognised in Canada as a public good which should be freely accessible to all, enabling 'Canadians, including employers, workers, job seekers and educational institutions, to make a range of informed labour market decisions' (Government of Canada, 2002, p.43). The public investment in such information was considerable, and the products were very impressive.

3.8 Public policy tended, however, to focus mainly on the collection and publication of such information, rather than on its effective utilisation. This might be explained in part on economic grounds in terms of the limited marginal costs involved, but also in part by the fact that collection and publication were areas where the legitimacy of federal action could be recognised most easily and progress readily made – issues relating to utilisation tended to cross jurisdictional boundaries.

[4] Information from Sareena Hopkins (see 3.13-3.14 below).

3.9 But the OECD review pointed out that public investment in information was of little value if its potential users were not able to access the information they require, to understand it and relate it to their personal needs, and to act upon it. In the case of many individual workers and job seekers, it contended, there were grounds for doubt about their capacity to meet these requirements. There was a need for more research in this area, including research on how people find and use information. But meanwhile there were good grounds for believing that information, while necessary, was not sufficient, in at least three respects:

- Equity of access. Most information requires good reading skills, and is not accessible to adults who do not possess such skills. In addition, information has tended to be more accessible to people in urban than in rural areas. As more information is delivered in electronic form, this marginalises those who do not have access to ICT or do not have the skills or confidence to use it effectively. (This issue is exacerbated by the multi-cultural mosaic of the Canadian population, and the number of languages it covers.)
- Difficulties in finding the information one needs. Most people are now faced with a surfeit of information. The ways in which they access and sift information are often very ad hoc rather than systematic: often they look for information only when they need it, and do so at the last minute, taking the quickest and easiest information source they can find. This means that their actions may be influenced by the information they chance upon rather than being based on a systematic trawling of a reasonably comprehensive range of relevant information.
- The widely expressed need to ”talk it through” with someone. Many people feel a need to discuss information with someone before they feel able to convert it into action. This ”someone” may be a friend or relation. Often, though, people feel it needs to be someone who is knowledgeable about the content of the information, and skilled in the process of helping them to relate it to their needs and to develop their confidence to act upon it.

3.10 The OECD review accordingly suggested that the strategy for developing career and labour market information as a public good needed to include the development of a network of forms of skilled personal support. This was particularly important if it was to be linked to a proactive strategy for lifelong learning designed actively to encourage all Canadians to reflect regularly on the development of their skills, learning and work throughout their lives. Some such support could be provided within the educational system, particularly if the place of career development within this system was made more coherent and accountable. But the network also needed to embrace employment services, extended to include employed people as well as marginalised groups.

3.11 In relation to labour market information, the review recommended that there was a need to provide more information on career paths, and from the perspective of adults in transition. There was for example inadequate information on earnings potential from this perspective, and cross-pathing between information on learning and work opportunities could be extended.

3.12 The review also pointed out that most LMI used occupations as the unit of analysis, and that this meant that it did not capture changes within occupations and was slow in capturing and describing new occupations. Basing LMI more on skills and competencies, it suggested, might in addition help individuals to move more flexibly across occupational boundaries, so enabling them to respond more flexibly to decline of demand within existing occupations or opening up of new occupations. There might be opportunities, using Canada’s sophisticated LMI data-collection

systems, to do cutting-edge work in this area. But there might also be limits to what could be done here: lists of skills and competencies tended to be complex, and one of the virtues of collecting information by occupation was its parsimony. This might accordingly be a further reason for emphasising the importance of human-assisted processes which could move across and beyond the boundaries which formal information imposed. In this respect, career development processes could be viewed as a powerful tool for opening up the labour market.

3.13 An interview held on 9.9.10 with Sareena Hopkins (Co-Director of the Canadian Career Development Foundation (CCDF)), and subsequent email contact with Michel Turcotte (Senior Analyst, Human Resources and Skills Development Canada), indicated that more recent relevant developments in Canada included:

- Work has started on developing quality standards for career development services, drawing upon a review of relevant international work in this area as well as of current practice in Canada (Bezanson & Plant, 2010).
- A mapping study of the career development sector has been completed. Its main focus was on the background, qualifications and roles of career development practitioners. Out of 866 responses to the survey from service providers, 67 were from private (for-profit) career/employment services providers (viewed as probably representing reasonably accurately the size of the private sector – i.e. around 8%): these were not however distinguished in the subsequent data analysis. The main services covered by the 866 providers were (a) career, education, training and labour market information services, (b) needs assessment services, (c) individual counselling, and (d) individual employment counselling. Others included (e) career coaching, (f) administration and interpretation of career assessment tools, and (g) placement services (Bezanson & O'Reilly, 2009).
- A study has recently been initiated by CCDF to examine the impact of LMI[5] on client outcomes related to career decision-making and job search. Focusing on adult workers seeking assistance with career decision-making or job search, its objectives include: (a) to examine the state of practice in Canada regarding how client needs for LMI are assessed and how LMI is actually provided; (b) to compare the impact of LMI when it is used independently versus with practitioner support; and (c) to explore in detail the actual client experience with using LMI. As part of the project, some work has been done on packaging LMI in accordance with identified client needs. Early findings suggest that when this is done, clients seem to be able to make constructive use of the LMI with limited or no additional coaching or support.
- A Career Development Services Working Group on Evidence-Based Practice in Career Development (CRWG) has been formed to address two issues: (a) increasing pan-Canadian sharing of research and promising practices, with an emphasis on sharing French and English research; and (b) strengthening the overall evidence base for career development practice, with an emphasis on informing policy. The group is co-ordinated by CCDF.
- Based loosely on the Australian CICA model (see 2.6 above), the Canadian Council of Career Development Associations brings together the executives of career development professional associations (largely provincial) and other significant organisations focused on career development, with the over-arching goal of promoting stronger professional identity across the career development field. This includes providing a mechanism for increased

[5] The definition of LMI being used here is a broad one: "information about the world of work and the labour market including any information that might be used to plan a career, decide what type of work to do, find a job, find the requirements for jobs, find a training program, find an education program, etc."

communication and collaboration regarding certification with the goal of simplifying, streamlining, and promoting practitioner mobility, and for keeping the existing Canadian Standards and Guidelines for Career Development Practitioners current and vital.

3.14 Further points made by Sareena Hopkins and/or Michel Turcotte included:

- The devolution of employment services to the provinces and territories, noted in 3.3 above, has continued. Thus in both the education and the employment development sectors in Canada, the bulk of career development services are provided by the provinces and territories, directly through school, college, university and public provincial/territorial employment services, and in case of the latter, partly or totally contracted out to third parties, mostly not-for-profit organisations.
- One of the impressions gleaned from carrying out the Quality Standards Survey (see 3.13 above) was that because provincial governments often contract out such services, there is a bidding process, and agencies have to be of high quality, with solid track records, in order to be successful. They are also held to higher accountability standards than was possible when services were delivered internally. Increasingly, there seems to be a trend to turn these contractual arrangements into true partnerships rather than just compliance relationships: this is over time resulting in higher-quality services to the public. Outcomes are also increasingly key to successful bids.
- At the same time, interestingly, some provinces are starting to move back to providing some services internally. They are doing so with "fresh perspectives" and a much deeper commitment to holistic service delivery and major investments in staff training. Such arrangements seem always to be in flux in Canada, but it seems that as services migrate, the standards of services tend to increase.
- Although what is now HRSDC (Human Resources and Skills Development Canada) still produce *Job Futures* (www.jobfutures.org) (which is aimed mainly at 'LMI practitioners' – cf. 3.5 above), it has largely pulled back from national co-ordination of LMI (cf. 3.4 above), seeking instead a more limited strategic role focusing on applied research and quality standards. The former includes research into both LMI and career and employment services, and what works. This represents a new thrust, and a welcome one.
- The modernisation of the LMI dissemination strategy has led HRSDC to move toward a single integrated website entitled "Working in Canada" (http://www.workingincanada.gc.ca/content_pieces-eng.do?cid=1&lang=eng), which is becoming the focal point for LMI produced by HRSDC. The contents of several websites have been integrated, and several on-line tools for job search and career planning purposes have been made available to the public through the Job Bank website.
- The HRSDC-funded Sector Councils, too, are playing a less prominent role in relation to LMI (where their main interest has tended to be to focus on using it to attract potential workers to their sector).
- With the devolution of employment services to the provinces and territories, most of them are now collecting, producing and disseminating LMI. The Forum of Labour Market Ministers (FLMM) has for many years had an LMI Working Group consisting of provincial and federal representatives (see 3.6 above): this facilitates the exchange of practices, collaboration on data purchase, and – in some cases – collaboration in the production of LMI products. In 2009, FLMM commissioned an Advisory Panel on LMI, which made recommendations (see www.flmm-lmi.org/english/view.

asp?x=1271&id=151) to which the LMI Working Group partners are responding.

- FLMM (an important and influential body) has in the past four years also established a Career Development Services Working Group which has championed projects such as the mapping study and the quality standards survey (see 3.13 above).
- There is currently a push to making LMI more local and more current, with the focus being less on technology than on interacting with employers at local level. As part of this, more attention is being paid to training career development practitioners to collect local LMI as well as to use it effectively with clients.
- The private sector in career development remains rather 'hidden' and has not developed any clear public identity (cf. 3.1-3.2 above); nor has it been the focus of public policy. It is still confined mainly to high-fliers and affluent parents. A growing part of the sector comprises career coaches and life coaches.
- Limited use has been made of technology in the career development field in Canada. Only two provinces have telephone helplines, and these are narrowly information-based. Use of online tools is not yet strongly developed. There have been few initiatives in developing career counselling or job-search counselling through the web (Tannis Goddard is one of the few providers of such services).

3.15 A further interview was conducted with Tannis Goddard, the Founder and President of BC-based Training Innovations (Tii) (http://www.training-innovations.com/), a career management organisation which since 1992 has delivered services to thousands of individuals each year. Tii are involved in the delivery of the contracted-out community based career services described in 3.14. Tannis Goddard was interviewed because she has pioneered an approach to online career guidance and developed the e-Volve virtual learning environment. e-Volve is designed for programmes, courses or counselling services that are delivered completely online, or blended with face-to-face services in a hybrid approach. It can be used in group or non-cohort delivery models (for details, see Goddard, 2010). Noteworthy features include:

- The Tii approach emphasises the career support as a learning intervention and draws on wider pedagogic thinking, particularly the pedagogy relating to e-learning.
- While the approach requires the development of high-quality information and learning materials, a human interaction between counsellor and client(s) remains at its heart.
- e-Volve has been successfully used with a range of clients representing different ages, ethnicities, social classes and levels of digital literacy.
- Delivering online guidance in this kind of mode has the potential to increase the efficiency of one-to-one interactions by enabling the user to move seamlessly between pre-prepared generic information and advice and tailored one-to-one guidance.
- Where e-Volve is used with a cohort of clients, it also provides a mechanism for facilitated peer learning, which enhances and supports the interactions with online information and resources and with the activities of the guidance professional.
- The online guidance approaches were initially developed in part to service clients in remote geographical areas; however, the approach has been found

to be more broadly popular with clients as it enables them to engage with career support whenever and wherever they choose.

- The approach taken by Tii represents a considerable shift in the delivery paradigm of career support. This clearly has implications for the setting of targets and for the training of careers professionals.

4. Germany

4.1 A review by OECD (2002c) noted that the German guidance system had traditionally been based on a clear institutional distinction between educational and vocational guidance. Responsibility for guidance on choices of institutions and courses within the educational system had been located within educational institutions themselves. On the other hand, until 1998 the only body which had been legally entitled to provide career guidance and placement services was the Federal Employment Service (*Bundesanstalt für Arbeit*) (since retitled the Federal Employment Agency – *Bundesagentur für Arbeit*). This monopoly had now been formally abolished, and this had resulted in the growth of new services within the voluntary and private sectors. Within the public sector, however, the distinction between educational and vocational guidance had been largely maintained. It was supported by formal co-operation agreements within each educational sector.

4.2 The Federal Employment Agency is funded not through the tax system, as in most other countries, but through social-insurance contributions from individuals and their employers. It is accordingly an autonomous public body, administered by three equal partners: employers, trade unions, and government. Alongside its wider responsibilities (which include placement services, funding further training, implementing labour market policy measures, and administering unemployment benefits), it offers a career guidance service both for young people and for adults.

4.3 The OECD review reported that the then Federal Employment Service's face-to-face guidance and placement services were supported by a range of information and other self-help services. These included impressive projections of medium- and long-term labour-market demand, based on the work of the service's own Institute for Employment Research. The resources included a number of separate databases on occupations, on training opportunities, on apprenticeship and training vacancies, and on job vacancies; they also included a career selection programme and other self-exploration programmes. The job-vacancy databases included only vacancies notified to the service: the possibility of extending this to cover other advertised vacancies was being explored (and has since been implemented).

4.4 Career information centres (BIZ) were available at almost every local employment office. The centres included a variety of information on occupations in printed and videodisc form, as well as audiotapes on questions relating to choosing careers and courses. Administrative and information staff were available to provide brief support; some centres also made a career counsellor available.

4.5 The OECD review noted that, following the end of the Federal Employment Service's formal monopoly of vocational guidance and placement services in 1998, a variety of services had grown up in the private sector (both for-profit and not-for-profit). For some time, some restrictions on private placement agencies remained: they had to be licensed by the Federal Employment Service, and agencies were permitted to charge fees to employers but not to individual job-seekers. There were accusations that this was impeding real competition. Social Code III had accordingly been altered in March 2002 to remove the licensing requirement and to enable private placement services to charge fees not only to employers but also to job-

seekers up to a specified amount (except in the case of young people seeking apprenticeship places, where fees could still be taken only from the employer). The placement fees included the guidance and counselling services necessary to get the job-seeker into a job.

4.6 In the case of career guidance services which did not include placement, however, no such restrictions had been imposed. No permit was required for providing such services, though the Federal Employment Service was able to prohibit their activity 'if this becomes necessary in order to protect the persons seeking advice'. In practice, no such case had ever been brought, and it was unclear how this power could be enforced.

4.7 The OECD review noted that, because the private sector in career guidance provision was unregulated, its extent and nature were unclear. It ranged from individual sole traders to large consultancy companies offering outplacement and career-development services, often as part of a wider range of services. The German Association of Management Consultants (BDU) had around 10,000 members, some 20% of whom claim to provide some career counselling services (though no information was available on how much of their time this consumed). The telephone 'yellow pages' listed some 630 individuals and organisations under the title *Karriereberatung*. Of the 420 members of the Register of Career Counsellors set up by the German Association for Educational and Vocational Guidance (*dvb*), 35 were from the private sector.

4.8 It was also unclear to what extent these services derived their income for career guidance services from individuals, from employers, or from public bodies like the Federal Employment Service and the municipalities. Some contracting-out of services from the Federal Employment Service had helped to stimulate the market. Services paid for by individuals or employers tended to be geared towards professional and executive levels; those purchased by public bodies tended to be geared to the unemployed or other disadvantaged groups.

4.9 The OECD review indicated that another area where the private sector played a role was publishing career information. Some of this was contracted by the Federal Employment Service. In addition, however, there was a growing commercial market of books, magazines, CD-ROMs and other media. Some of these materials were free to the user: these include materials financed by advertisements, and other materials distributed by banks, insurance companies, trade unions or employers' organisations, as well as materials published by the Federal Employment Service itself.

4.10 The OECD review indicated that if the Federal Employment Service was to fulfil its functions effectively, it was likely to need to devote more resources to its guidance services. The review noted that there could also be arguments for expanding the role of the private sector, though there seem to be widespread doubts about its potential for substantial expansion within the foreseeable future in guidance (as opposed to placement) services. It further recommended that more explicit quality standards were required, with a clear procedure to enforce them.

4.11 Since the OECD review, comprehensive labour market reforms and a restructuring of what is now the Federal Employment Agency, alongside the impact of the OECD PISA surveys, have all had effects on the provision of career guidance. A more recent draft paper (Jenschke, Schober & Frübing, 2010) includes the following relevant points:

- The German National Guidance Forum in Education, Career and Employment (*Nationales Forum Beratung in Bildung, Beruf und Beschäftigung e.V., nfb*) has initiated an "open process of co-ordination for quality development in career guidance" among the relevant actors and stakeholders in the field of career guidance, to develop quality standards and a competence profile for counsellors. The project – funded by the Federal Ministry of Education and Research – aims to achieve a common understanding of career guidance, a set of required quality standards for career guidance delivery, and a competence profile for counsellors, as well as a Quality Development Framework to support service providers in their quality assurance and management systems. The joint project will also develop a set of tools and guidelines for the implementation of the framework.
- In addition to the *dvb* (mentioned in 4.7 above), the German Association for Career Counselling (*Deutsche Gesellschaft für Karriereberatung* – DGfK) – an association of private practitioners specialising in recruitment and outplacement counselling for professional and managerial staff as well as consulting for companies – currently has 27 registered members.
- Alongside these business consultants and private career guidance practitioners, the number of non-profit organisations that offer guidance services has increased substantially. Many Federal or *Länder* Government programmes require accompanying guidance activities, which are often contracted out to these organisations by a temporary contract for the time of the programme or even shorter. This market is still unregulated.
- The Federal Employment Agency remains the largest provider of career guidance online portals. Its online services for different guidance needs and target-groups include: an online job exchange (Jobbörse) which includes online self-assessment tools, online application tools and a matching programme for applicants and vacancies (http://jobboerse.arbeitsagentur.de/); BerufeNET, a comprehensive database of occupational descriptions, training, career and labour market information (http://berufenet.arbeitsagentur.de/berufe/index.jsp); KursNET, a comprehensive database on educational and training opportunities (http://kursnet-finden.arbeitsagentur.de/kurs/portal); Planet-Beruf, a career choice programme for lower secondary school students, school leavers and teachers as well as parents, including in-depth occupational and training information, self-assessment tools, portfolios, application tools etc. (http://www.planet-beruf.de/); and two online portals for higher education students (http://www.abi.de/index.htm and www.studienwahl.de) (in co-operation with the *Länder* Governments).
- The Higher Education Compass *(Hochschulkompass)* provided by the German Rectors Conference *(Hochschulrektorenkonferenz)* is a comprehensive online portal on academic education and university courses including academic further education and international study opportunities in other countries (www.hochschulkompass.de): an example of collective provision by opportunity providers. In addition, there are numerous private and semi-private websites on higher education.
- The Federal Ministry of Education and Research is currently planning to set up a nationwide telephone hotline and an internet portal for educational and career guidance.
- In addition to these nationwide web portals, some municipal guidance providers have introduced email and chat-based guidance services, which may be of particular importance in rural areas.

4.12 A telephone interview conducted on 10.9.10 with Karen Schober, representing the National Guidance Forum, identified the following additional points:

- The Federal Employment Agency is still the largest service provider in the career guidance field in Germany, but increasingly important strategic roles are being played by the Federal Ministry of Education and Research and by the *Länder* Governments, particularly in the adult education sector.
- The Federal Ministry of Education and Research does not run guidance services itself, but it funds some services operated within the *Länder* or within local communities (municipalities).
- The Learning Regions Programme (2001-07), for example, established adult guidance services in 75 regions, around half of which have proved sustainable. More recently, the Local Learning Programme (started in 2009) is operating initially in 40 municipalities, with plans to be rolled out to others: career guidance is one of its four priority issues. An interesting feature of the latter is the importance given to establishing partnerships between local organisations and private non-profit foundations (some of which were established by large companies, incentivised to do so by the tax system).
- Some *Länder* have also organised their own initiatives. A particularly strong example is the *Land* of Berlin, which funds some 20 independent non-profit career guidance centres. It requires from the providers a formal quality-assurance accreditation as a precondition for the funding.
- The Federal Ministry of Education and Research is also working closely with the *Länder* Governments in relation to the new telephone hotline and internet portal (see 4.11 above). Some piloting work has started.
- An interesting partnership activity between the Federal Employment Agency and the Federal Ministry of Education and Research in relation to young people has been the introduction into schools in socially deprived areas of career/job coaches to work with young people at risk. Each funds 1,000 such coaches; the programme is managed by the Federal Employment Agency. Private, semi-private and non-profit organisations can apply to deliver the programme; when they win their contract, they employ staff to fit the programme's requirements. The tender says that they should have the competence but does not specify the requirements: most are socio-pedagogists, vocational trainers or former teachers etc. rather than guidance professionals. The organisations which employ them are mainly chambers of commerce or crafts, training providers, charitable organisations, etc. They can sub-contract where necessary. This is an example of shifting from the traditional legal institutions to the private and non-profit market, and of the non-profit sector extending their services in for-profit areas (some of the larger organisations have established separate enterprises so that they can operate within this market).
- The Federal Employment Agency outsources the management of some of its products to the private sector (there are two or three main commercial providers operating in this area). There are also some websites and other resources at regional/local level and in the private sector, but they are limited by comparison.

5. Netherlands

5.1 A review by OECD (2002d) concluded that the policies of decentralisation and marketisation had been applied more strongly to career guidance and information in the Netherlands than in most if not all other OECD countries. There was a widespread view outside government in the Netherlands that the role of the

government in relation to such policies was now in urgent need of review. Its position was widely seen as representing not delegation but abdication. Many believed that instead of "staying at arm's length", it should adopt a clearer and more proactive stance. A representative of the major employers' organisation was quoted as commenting that the government had responsibilities in this area which it was not currently carrying out.

5.2 In particular, in the early 1990s the government had merged the state-financed guidance offices with two other organisations – the contact centres for education and work (COAs) and the regional apprenticeship agencies (ROLs). The 16 regional guidance offices (AOBs) that emerged from this merger were expected to provide demand-based guidance services both to schools and to the employment services. Their direct government subsidy was gradually withdrawn. Instead, the public monies involved were channelled through the schools and the employment authorities. After 2000 these organisations could choose if they wished to purchase services from the AOBs on a fee-for-service basis; they were also free to purchase services elsewhere or to retain the monies and provide the services themselves.

5.3 At the same time, the AOBs were encouraged to explore other potential markets for their services. The difficulties they had experienced in developing new markets and retaining their existing markets had meant that the number of AOBs had been reduced, through mergers, takeovers and bankruptcies, from 16 to 3, with the number of staff shrinking from around 1,800 in the mid-1980s to around 300 (for a detailed account, see Meijers, 2001). Their walk-in centres, of which there were 54 at one time, had all closed: they were not sufficiently accessible in terms of location and opening hours, and no way was found to fund them on a sustainable basis. Many of their services now focused on psychological testing services designed to meet institutional rather than individual needs: i.e. for screening and selection rather than guidance purposes.

5.4 Alongside the progressive privatisation of the AOBs, the OECD review reported that a similar process had taken place in relation to career information. The education and employment ministries in 1992 had transferred many of their respective information and materials-development activities to a privatised National Career Service Centre (LDC). Initially LDC was fully subsidised by the government, but these subsidies had gradually been reduced, being replaced by sales of products (particularly from schools and also from HRD departments within companies) and contracts for particular activities; from the end of 2002 the subsidies were to disappear altogether.

5.5 The OECD review noted that the government has recently reassumed responsibility for some career information services through website development. Thus the Ministry of Social Affairs and Employment had developed the www.werk.nl website, some of the design of which was contracted out to the LDC. This included diagnostic instruments (based on interests), data on occupations (including labour-market trends and salary data), information on education and training opportunities, and access to a database of job vacancies. There were also plans to develop a linked client support centre, to be accessible by telephone, e-mail, fax and post. A particularly impressive feature of this work was a database of projected labour-market demand in some 2,500 occupations, linked to related education and training routes. Again, the Ministry of Education, Culture and Science was developing a website on educational opportunities. The ready availability of free information on these websites left LDC (along with other private-sector career information suppliers) to face the issue in the future of how its marketised products could continue to add value to such information.

5.6 The OECD review identified the key issue here as being: what are the appropriate and necessary roles of government within a decentralised and marketised system in order to make it work effectively? If career information and guidance is not only a private good but also a public good, with an important role to play in national strategies for enhancing lifelong learning and sustained employability, this is an important question.

5.7 The review noted that the effect of government policies to date in the Netherlands had been to place purchasing power in relation to guidance services in the hands not of the demand side but of the supply side: not of individuals but of institutions with their own agendas and priorities. The issue was whether such agendas and priorities were necessarily and invariably congruent with the interests of individuals and with the wider public good. This was open to question.

5.8 A later report by Van Deurzen & Jansen (2006) noted that a fairly substantial market had developed to service the demand for career guidance by organisations, unions, publicly-funded reintegration services and individuals. This included the surviving AOBs, companies consisting of staff from the AOBs or from the former public employment service, some independent traders from these and other backgrounds, and a range of other organisations including some large consultancy organisations. Some of these providers concentrated on offering career guidance services, while others offered such services as part of a range of other training and HRD services.

5.9 The same report also indicated that the government appeared to see itself as having a role in making career information accessible, to stimulate self-help. A portal (www.opleidingenberoep.nl) had been set up for this purpose.

5.10 The National Centres of Expertise on Vocational Education (see www.colo.nl) have developed a web portal (www.beroepeninbeeld.nl) which contains information on occupations for career choice purposes, including videos, and covering salary details. Some sectors have also developed websites on career paths within their sectors: examples are the building sector (www.loopbaantrajectbouw.nl) and painters (www.loopbaanprojectschilders.nl).

5.11 A report by Van Beek, Oomen & Van Deurzen (2009) suggested that there was a need to reorganise and harmonise existing websites and data, and indicated that the Project Directorate for Learning and Working (jointly established by the Ministry of Education and the Ministry of Social Affairs and Employment) was taking initiatives in this respect. It also mentioned the challenge of moving from a 'window' to a 'Wiki' concept, but without elaborating this.

5.12 Contact in September 2010 with Peter van Deurzen of Euroguidance Nederland indicated that the policy approach adopted for guidance of adults within the new Project Directorate was a decentralised, regional approach, based on partnerships which differ from region to region. These are still being established: quality guidelines on minimum provision of services, national and regional information provision, quality of guidance workers, etc. have not yet been established. The place of guidance within these regional structures is still somewhat marginal: they are more concerned with APL procedures, work placements, dual learning trajectories, etc.

6. New Zealand

6.1 The major deliverer of career support services in New Zealand is Career Services. It was described in a recent review as ”the most fully-integrated version of a national multi-channel all-age service in the world that is dedicated to career planning support”. The review cited the OECD Career Guidance Policy Review as suggesting that ”the priority for policy makers in most OECD countries should be to create separate, and appropriate, occupational and organisational structures to deliver career guidance” (OECD, 2004a, p.102). It suggested that, in organisational terms, Career Services represented ”a prime exemplar of the recommended approach” (Watts, 2007, p.7).

6.2 Structurally, Career Services is a Crown entity established in 1990 to ‘assist in the achievement of government education, training and employment goals through the provision of high quality information, advice and guidance services’. Its relationship with government and the wider state sector has more recently been strengthened and formalised through the Crown Entities Act 2005. Career Services is one of six government education agencies, which the Government expects to work closely together. It is governed by a Board which is appointed by, and reports to, the Minister of Education.

6.3 The current structure followed an attempt made during the mid/late 1990s to privatise the service. A government review in 1995 recommended that what had previously been a fully-funded public service should be split into two separate businesses, one for career information and the other for career guidance, with a view to the full privatisation of the latter. The underlying rationale was that career information had ”a high public good component” and was likely to be subject to market failure, with the implication that career guidance was more of a private good and could be provided to a substantial extent through the market (Career Services Rapuara, 1995; see also Hesketh & Kennedy, 1991). In the event, difficulties were experienced in developing a market for career guidance; with the election of a new government in 1999, the notion of privatising the career guidance part of the work was effectively abandoned.

6.4 Services are provided by Career Services through three main channels:

- Face-to-face: in regional centres or other locations. Increasingly, the emphasis is on offering such services on an outreach basis, and working with groups rather than individuals.
- Voice-to-voice: by telephone.
- Web-based services, some of which may include direct interaction with a person (e-mail, chat), and some of which may not.

There is also a strong emphasis on building the capacity of other service deliverers – e.g. in schools.

6.5 The 2007 review noted that the web-based services were long-standing. Work started in the early 1990s on developing a computer-based information system (Quest Database) and a computer-aided guidance system (CareerQuest). The development of a web-based version of the Quest Database led to the development of the KiwiCareers website. In 2005/06 the website was significantly redesigned, to include a number of new features (e.g. a subject search engine to link school subjects to careers, and a skill classification system to relate skills to careers). It is comparable to the Australian MyFuture system (see above).

6.6 According to the 2007 review, the aim now was for the website to connect more strongly to personal support services, through email, chat, freephone or call-back – a range of options from which individuals could draw. This was particularly being developed through the Better Tertiary and Trade Training Decision Making (BTATTDM) project, which explored the use of phone-texting and outbound callbacks for communicating with key audiences, and web chat as the only service-delivery channel that attracted more young males than females.

6.7 The review noted that the private sector in career development services appeared to be relatively more extensive in New Zealand than in many other OECD countries. A survey of New Zealand career practitioners in 2002 found that 29% were self-employed (Inkson, Furbish & Parker, 2002). The growth of the private sector had been fostered by the privatisation policies of the 1990s. A number of people working in this sector were former members of Career Services staff.

6.8 The review indicated that Career Services was sometimes in competition with private-sector providers: for example, in competitive tendering for Ministry of Social Development or other commercial contracts. At times, however, it acted to a limited extent in a ”market making” rather than ”market taking” capacity. For example, it included some signposting to the private sector within its information resources. Thus those making information and advice enquiries by email were told that if they wished to talk to a careers consultant, they could go to Career Services regional centres, or alternatively to a private-sector careers adviser, in which case they should consult the Yellow Pages under ”careers advice”. Private-sector services were also free to make use of Career Services resources.

6.9 More recently, steps have been taken by Career Services to extend its services to many more New Zealanders, and to do so on the basis of being cost-effective and providing value for money. The core goal is defined as being building or supporting ”career literacy”, defined as ”the ability for people to self-manage their careers in the future”. Effective use of ICT is seen as crucial to the strategy. The proposed delivery model is based on a shift in resource allocation over time from regional face-to-face activity to centralised web- and telephone-based personal services. The regional face-to-face activity will focus more strongly on building the career-development skills of others and providing guidance to those most in need.[6]

6.10 A telephone conversation was held on 7.9.10 with Lester Oakes, Chief Executive of Career Services, and three of his colleagues (Janet Brown, Janis Freegard, Julie Thomas). This verified the notes above. Additional points that emerged in the course of the conversation included:

- Rather than seeking contracts from other government departments, Career Services is now increasingly working in partnership with them, within each other’s existing resources. This is linked partly to the tightening of public resources due to the recession, and partly to pressures from within government to get different departments and agencies to work more closely together.
- The greater emphasis on outreach noted in 6.4 above is being applied not only in terms of face-to-face services but also in terms of technology, with more time being spent on entering social media spaces and message-boards not only to promote services but to interact with people with career issues. It is a policy of outreach through ”technology and wheels”.

[6] Information provided by Lester Oakes, May 2009.

- A stronger needs-assessment process has been introduced to ensure consistency in how clients are matched to services, regardless of which channel they enter through (most now come through the telephone or website).
- On CLMI, Career Services acts partly as ”gannets”, garnering information produced by government departments and other public agencies, often for policy purposes, and translating/reframing it for use by citizens for career development purposes. It also, however, collects its own trend information from employers and training organisations. In general, none of this involves financial transactions.
- Some resources are spent buying in resources like Myers-Briggs and The Real Game. But the sums involved are not large.
- Investment in technology is consuming a growing proportion of Careers Services budgets. This includes buying in technical services from outside. There is growing collaboration between public agencies to share technical infrastructure and resource costs where possible.

6.11 A subsequent Skype conversation was held on 14.9.10 with Megan Smith, President of the Career Development Association of New Zealand (CDANZ). The main relevant points that emerged were:

- CDANZ currently has 520 members, of whom 16% work in schools and tertiary institutions, and 13% for Career Service. Many of the rest work in the private or community-based sectors: 18% are engaged in vocational rehabilitation work with Work Bridge (www.workbridge.co.nz), an independent non-profit organisation; 17% are in private practice; and 24% work for private-sector agencies and other organisations, both for-profit and non-profit. The balance has been reasonably steady for the last few years.
- Most private practitioners operate on a face-to-face basis. Some are beginning to make some use of Skype, though the slow broadband speeds in rural areas in particular can make effective video contact difficult.
- A range of different organisations are now placing CLMI on the web. In particular, a number of Industry Training Organisations (ITOs) are doing this, to boost recruitment into their sectors: a strong example is farming (www.godairy.co.nz).
- A strong recent activity has been Career Months: a way of branding local community-based initiatives related to employment. Stimulated by the national Mayors’ Task Force for Jobs, these have been held in several areas now, including Waikato and Otago. A strong web presence has proved important, both to harness the energies of local partners and to communicate to the wider community.
- The Career Services ”market making” role (6.8 above) operates partly through referrals of clients outside their primary target-groups who are seeking intensive guidance, and partly through the general increase in awareness of career development services amongst the public stimulated by the Career Services website: many of Megan Smith’s own clients are aware of this site, both through school and general internet searching, and have used it as a source of information, though not necessarily engaging with their individual services.

7. USA

7.1 A University of Derby study by Hughes & Gray (2004) identified three main types of career support provision for adults in the USA:

- Public provision, including federal departments, state labour offices, state education offices, and one-stop centres (community colleges should be added to this list). The one-stop centres were provided with start-up funding by the federal government, on the understanding that the states would be responsible for ongoing funding. (There are no restrictions on who can be served by the one-stop centres, though some of the more individualised services are restricted to particular groups, e.g. veterans.[7])
- Private (for-profit) organisations. These include (a) career counsellors in private practice where the user pays; (b) companies which offer certified programmes in career counselling alongside service delivery for those willing to pay; (c) companies which offer outplacement services, including career coaching, management services, training and executive search; (d) companies which offer website on-line services for job-search support; and (e) companies which offer career development and training to employees, external individuals and organisations.
- Public-private partnerships. These include collaborative arrangements whereby some service delivery costs are met by government (usually services aimed at targeted groups) while other services are linked to income-generation activities where the user pays. Examples include universities, professional organisations, and voluntary and community-sector organisations.

It was noted that the arrangements varied considerably across the USA, where different states had autonomy to introduce legislation and develop their own policies and practices; the federal government tended to confine its role to providing funding for programme development (including website development) and training, as with the one-stop centres.

7.2 The study included a study-visit to the East Coast of the USA. The report noted that 'the depth and range of information gathered could not have been easily elicited from website or telephone discussions' (Hughes & Gray, 2004, p.8) – which underlines the limitations of our current study for the UK Commission. Points of interest emerging from this study-visit included:

- Senior executives often expected to pay for career development services (often described as career coaching or mentoring) and tended to reject public-sector services, which they associated with the unemployed. (Subsequently, interest in career coaching has continued to grow among career practitioners and the general public.[8])
- Executive search and outplacement services, paid for by employers, were well established.
- Much of the market appeared to operate through services provided not to individual end-users but to "intermediary" institutions (e.g. employers, colleges) which then made the services available to their members (e.g. employees, students).

[7] Information provided by Professor James P. Sampson, Florida State University.
[8] Information provided by Professor James P. Sampson, Florida State University.

- There appeared to be a growing market in career professionals developing their private practice. They tended to guard their assessment instruments closely. Common branding might be helpful in expanding this market.
- A growing niche market was based on financial institutions developing career development services to facilitate a more rapid return to the labour market and thereby reducing revenue loss to the insurer. This is less relevant to the UK, where levels of insurance against unemployment are more limited.
- The rapidly increasing number of free websites and assessment instruments was perceived by some as threatening the market in career resources.

7.3 Hughes & Gray reported that labour market intelligence in the USA was primarily funded by state taxes. The Bureau of Labor Statistics in the US Department of Labor obtained labour trends information from states, which were then aggregated into a national database. Some states chose to produce additional information beyond the minimum requirements. Most of this information was freely available on websites and databases.

7.4 Currently, the key source of occupational information in the USA is O*NET (www.onetonline.org), which is managed by the US Department of Labor and is available to all, free of charge. It comprises an online database of around 900 of the most prevalent occupations in the country. The taxonomy of occupations is used for all related information produced by the federal government (number of workers, salaries, 'outlook', etc.). The quality of the information is viewed by Maze (2009) as the best available, and as setting the standards for other countries. But because it catalogues all workers, it is also seen as emphasising occupations that require little education: Maze suggests that people working with college-bound or college-graduate populations may prefer different occupational lists because graduate-level occupations are under-represented in O*NET.

7.5 Maze notes that any person who is able to understand the search criteria and use them effectively can find a great deal of valuable information at the O*NET website. In addition:

> "People who are good researchers and capable of sifting through large amounts of information may supplement O*NET by using a common search engine, such as Google, to find information about occupations of interest. However, evaluating the accuracy of information using an ad hoc search process can be difficult, and much of the information found will be biased. For example, professional associations are happy to provide information about the professions they represent, but often provide a rosy viewpoint designed to attract people to the field" (p.48).

She continues:

> Those that find O*NET confusing may prefer a comprehensive CACG [computer-aided career guidance] system that provides information in a format that is designed for the career seeker. Several such systems are in common use today, such as DISCOVER, CHOICES, and XAP. Many CACG systems use the O*NET occupations, but may provide supplemental information to facilitate career choice" (p.49).

7.6 A further important resource is the *Occupational Outlook Handbook* which has been produced for many years by the US Department of Labor (www.bls.gov/oco). This includes, for each occupation, information on earnings and expected job prospects. It also includes links to sources of LMI produced by each of the states. It is revised every two years.

Appendix 2: Consumer research

The participants

Research was undertaken with 38 individuals, of different ages and qualification levels, and with different levels of participation in the labour market. Whilst most of the career support market is targeted at and used by the higher-skilled graduate, our research deliberately involved groups who were lower-skilled. This was to ascertain the use of ICT-mediated career support by those who were more likely to be users of publicly provided career support such as that provided by Next Step and who were assumed to be more likely to be on the wrong side of the digital divide. However, higher education students were also involved to give the perspectives of those further along the continuum, who might be assumed would be more comfortable and confident with accessing career support via ICT. The further education participants were undertaken as part of a focus group; the remainder were randomly asked to participate. All participants were informed of the purpose of the work, by whom it was being funded, the terms of their participation, and how the research would be reported.

The table below summarises the profile of those who participated in the research.

	Number	**Gender**		**Age range**
		F	M	
HE students	10	5	5	18-36
FE students	11	11	0	17-40
Next Step clients	8	3	5	28-53
Jobcentre Plus clients	12	3	9	18-43

Additional research findings

People find out information about the courses they study, the careers they choose or the jobs they want from a wide range of informal and formal sources. Most often mentioned was friends and family or other people they knew, such as work colleagues or tutors. Information sources such as the internet and library were also mentioned. Several individuals said that they asked no-one, expressing a sense that they felt in sole charge of making their own decisions. Formal sources of careers support – such as Connexions, Next Step, Higher Education Careers Service or Jobcentre Plus – were mentioned by about half of the participants. Even though the interviews were all conducted in places that had access to formal career support, these were not explicitly mentioned in all the interviews, so for example one only of the respondents that we spoke to in the Next Step office volunteered the information that they had spoken to Next Step to get information about jobs or careers. This raises questions about the extent to which people see their need as being a “career information” need rather than “help with getting a job or help with getting benefits”, and the extent to which these are seen as different activities.

Most people said that they would not pay for career advice. They said that people in their position (for example, students, people looking for work) should not have to, and they questioned why should they when it has always been a free service? However, a significant minority said that they might pay, albeit with the additional qualifiers that it would have to be relatively cheap and would have to generate a positive (job-

related) outcome. Even in the context of talking to people who were actively looking for work or seeking job or career advice, few said they would pay, and they would not pay much. Thus while this evidence does not negate the existence of an “individuals pay” market for career support, neither does it indicate significant potential for the development of such a market.

For the main findings from this survey, see Section 2.3.

Appendix 3: Stakeholders interviewed from the UK career support market

Jane Artess	Graduate Prospects	http://www.prospects.ac.uk/
Marie Brett	Connexions Tyne & Wear	http://www.connexions-tw.co.uk/
Matthew Broadbent	Lawcareers.net	http://www.lawcareers.net/
Christine Buccella	BestCourse4Me.com	http://www.bestcourse4me.com/
Murray Cox	Skills Development Scotland	http://www.skillsdevelopmentscotland.co.uk/
Jeffrey Defries	icould	http://icould.com/
Mick Downing	Jobcentre Plus	http://jobseekers.direct.gov.uk/homepage.aspx?sessionid=375573eb-861d-40cc-99d9-5f9d782f8c9f&pid=1
Angie Elliott	BSS	www.bss.org
John Fairhall	Learner Support Services, University of Bradford	http://www.brad.ac.uk/lss/
Mark Freeman	Careers Wales	http://www.careerswales.com/
Nicola Hannam	The Science Council	http://www.sciencecouncil.org/
Tammy Goldfeld	Careers and Employability Division, The University of Manchester	http://www.careers.manchester.ac.uk/
Lynda Lacey & John Kelly	CASCAiD	http://www.cascaid.co.uk/site/main9d5e.html
Edward Mellett	WikiJob	http://www.WikiJob.co.uk/
Owen Morgan	Penna	http://www.penna.com/
Simon North	Position Ignition	http://www.positionignition.com/
Jean Pardoe	Nottingham and Nottinghamshire Futures	http://www.cnxnotts.co.uk/futuresnn/index.html
MT Rainey	Horsesmouth	http://www.horsesmouth.co.uk/
Clare Riding	Head of Open University Careers Advisory Service	http://www.open.ac.uk/careers/
Denise Taylor	Amazing People	http://www.amazingpeople.co.uk/
David Winter	The Careers Group, University of London	http://www.careers.lon.ac.uk

Appendix 4: Glossary

Career guidance

"Career guidance refers to services and activities intended to assist individuals, of any age and at any point throughout their lives, to make educational, training and occupational choices and to manage their careers. Such services may be found in schools, universities and colleges, in training institutions, in public employment services, in the workplace, in the voluntary or community sector and in the private sector. The activities may take place on an individual or group basis, and may be face-to-face or at a distance (including help lines and web-based services). They include career information provision (in print, ICT-based and other forms), assessment and self-assessment tools, counselling interviews, career education programmes (to help individuals develop their self awareness, opportunity awareness, and career management skills), taster programmes (to sample options before choosing them), work search programmes, and transition services" (OECD, 2004b, p.10).

Career and labour market information (CLMI)

Career and labour market information is information drawn from the wider careers market which is available in a format that is useful to the career support market. These data include labour market information (LMI), encompassing information about labour market trends, occupational requirements and salary/wage rates. They also include a wider range of career information encompassing learning opportunities, their relationship with the labour market, and any other form of information which may be relevant to individuals moving through the careers market.

Career management skills

"A range of competences which provide structured ways for individuals and groups to gather, analyse, synthesise and organise self, educational and occupational infor-mation, as well as the skills to make and implement decisions and transitions" (Vuorinen & Watts, 2010, p.23).

Career support

Career support is concerned with how individuals relate to learning and work across their life course. It describes a range of services and relationships that people draw upon in order to help them to make decisions, navigate changes, deal with adversity and maximise their personal and economic potential. Career support exists in both professional and non-professional forms. Users may seek career support from career professionals and/or from a range of other sources, including career informants.

Career informants

Career informants are people with personal experience in the career paths that users are interested in entering.

Digital divide

"Refers to the gap between individuals, households, businesses and geographic areas at different socio-economic levels with regard to both their opportunities to access information and communication technologies (ICTs) and to their use of the Internet for a wide variety of activities" (OECD, 2001).

Digital literacy

"The awareness, attitude and ability of individuals to appropriately use digital tools and facilities to identify, access, manage, integrate, evaluate, analyse and synthesise

digital resources, construct new knowledge, create media expressions, and communicate with others in the context of specific life situations, in order to enable constructive social action; and to reflect upon this process" (Martin, 2006).

Labour market

"The labour market is the real or virtual meeting point, within an economy or market place, where people selling their labour (employees) negotiate and may reach an agreement with those who buy it (employers). Labour markets provide the structure through which workers and employers interact about jobs, working conditions and pay. Other actors are the institutions and processes of collective bargaining, including the roles played by employers' organisations and trade unions. The labour market concept also covers issues such as employment, unemployment, participation rates and wages" (EuroStat, 2010).

Labour market information

Bimrose & Barnes (2010, pp.15-25) define LMI for career guidance/IAG as including the following elements:

- information on general employment trends (e.g. historical trends, future demand);
- data on the structure of the labour market (i.e. what jobs exist, how many, which sectors, which occupations);
- information about the way the labour market functions (i.e. how people get into jobs and move between employers, etc.);
- the interaction between labour demand and supply (i.e. mismatches – as reflected in unemployment rates, skills gaps, skills shortages, etc.);
- data on national, regional and local labour markets variations (i.e. size of workforce, prominent sectors etc.);
- data focusing on equality and diversity (i.e. which individuals are employed in different sectors and at what levels?);
- information on progression routes (i.e. career structure, earnings, transferability of skills).

Learning market

"In the learning market, private and publicly-funded organisations, such as educational institutions and learning centres, contribute to the supply of learning that both employers and individuals demand" (Scottish Government, 2003).

Information literacy

"Information literacy is knowing when and why you need information, where to find it, and how to evaluate, use and communicate it in an ethical manner. This definition implies several skills. We believe that the skills (or competencies) that are required to be information literate require an understanding of:

- A need for information
- The resources available
- How to find information
- The need to evaluate results
- How to work with or exploit results
- Ethics and responsibility of use
- How to communicate or share your findings
- How to manage your findings"

(CILIP, 2004).

Quasi-markets

Quasi-markets are market-based mechanisms for outsourcing of public-service provision, in the form either of contracts (with governments effectively managing the outsourced market through competitive tendering processes) or of vouchers (through which governments seek to empower consumer choice).

Social media

“Social Media is a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content” (Kaplan & Haenlein, 2009).

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